erwin DI Suite

Workflow Manager

Quick Start User Guide 9.3

About Workflow Manager

The Workflow Manager helps Organizations create custom workflows and monitor the execution of workflows and tasks assigned to the workflow. erwin’s Workflow Manager provides built-in workflows for Metadata, Mapping and Glossary Management and these workflows can be completely customized depending on an organization’s data governance needs.

Custom workflows can be created and these workflows can be associated to Mappings, Metadata (tables and columns) and Business Terms to govern the lifecycle from creation to approval. Every workflow can have custom stages configured (for reviews and approvals) and user roles can be assigned for each stage to provide a gated review process. Users have access to an *easy to use* graphical workflow designer interface which helps them configure workflows according to their requirements. All the users that are part of a workflow have have access to a work queue to track the status of each object that they are assigned to.

Key Highlights

1. Global & process specific workflow configuration screen

2. Define stages for your workflow

3. Assign roles to each stage in workflow

4. Define actions/transitions between states

5. Dashboard Work queue to track workflow action items

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Intended Use

This document is a Quick-Start User Guide intended to train users on how to get quickly acclimated to the Mapping Manager application and using it to create dynamic metadata driven source to target mapping specifications. It is important to note this documents is not intended to be a fully detailed and in depth users guide. Thereby, this Quick-Start guide will cover only the basics in terms of the usability of the application. Many of the features and capabilities will not be covered in the Quick-Start User Guide.

Erwin, Inc. recommends clients procure onsite training or services for hands on training and mentoring of resources on usability and best practices regarding the use of Mapping Manager.

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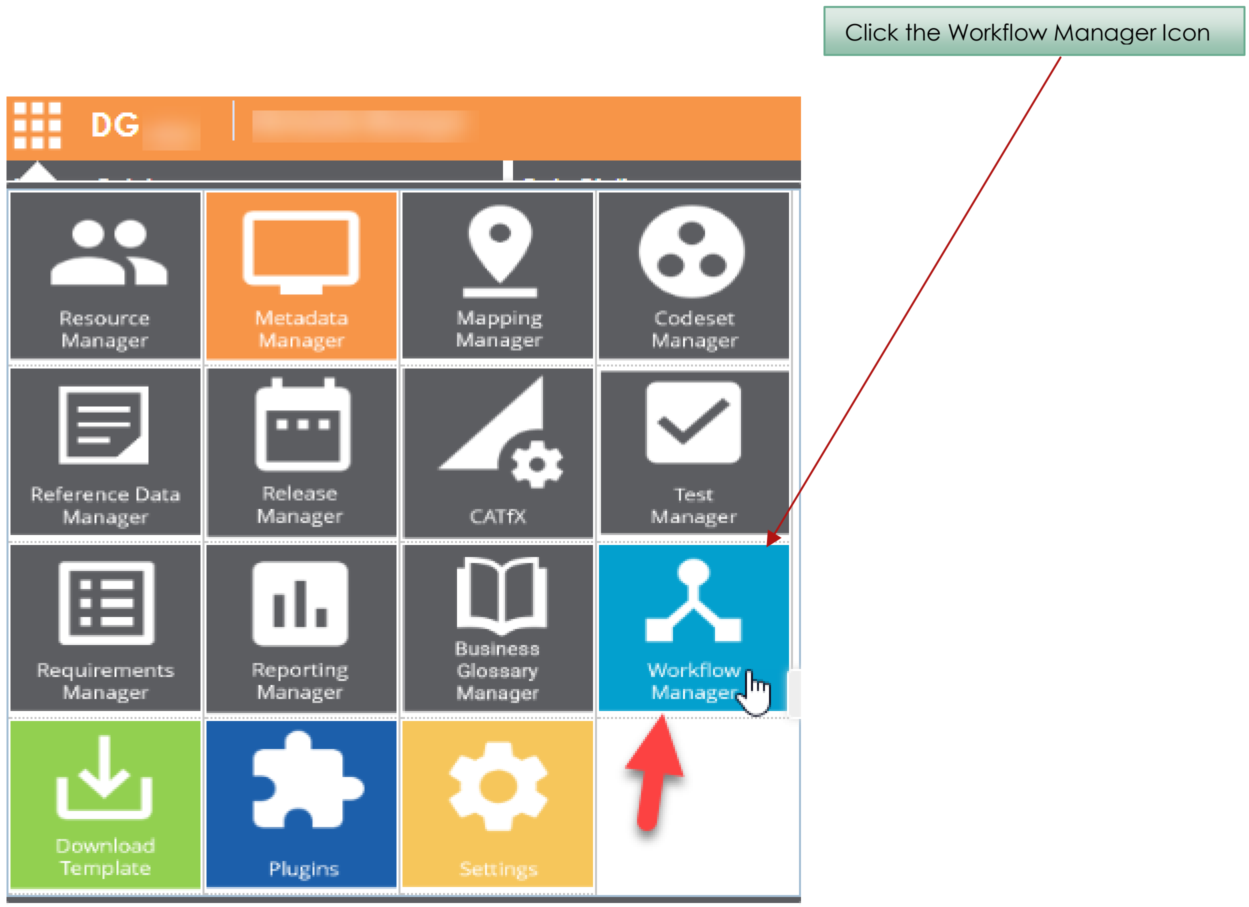
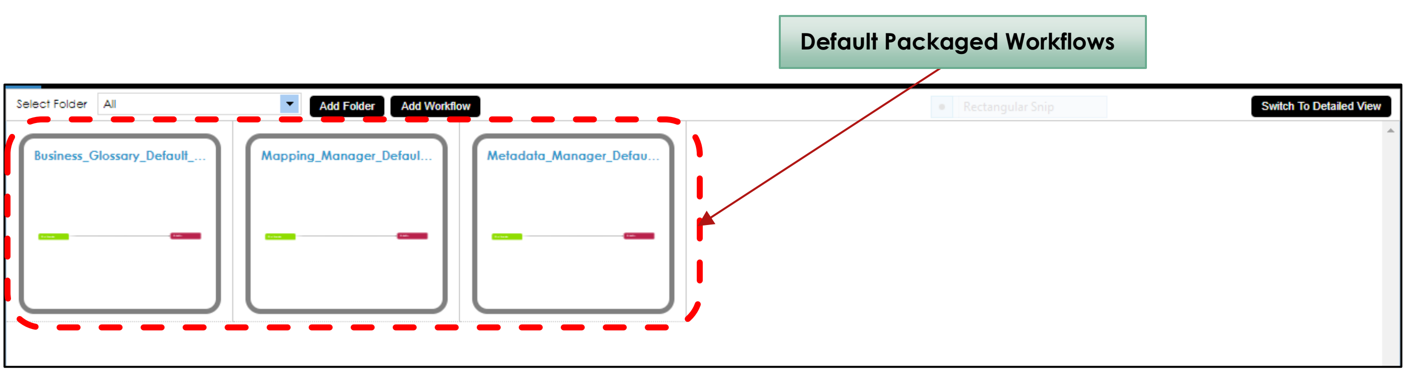
GUI and Screen Layout

Click on the Launchpad icon on the top left corner and click on "**Workflow Manager**" icon on the Launchpad menu to access the Workflow Manager module.



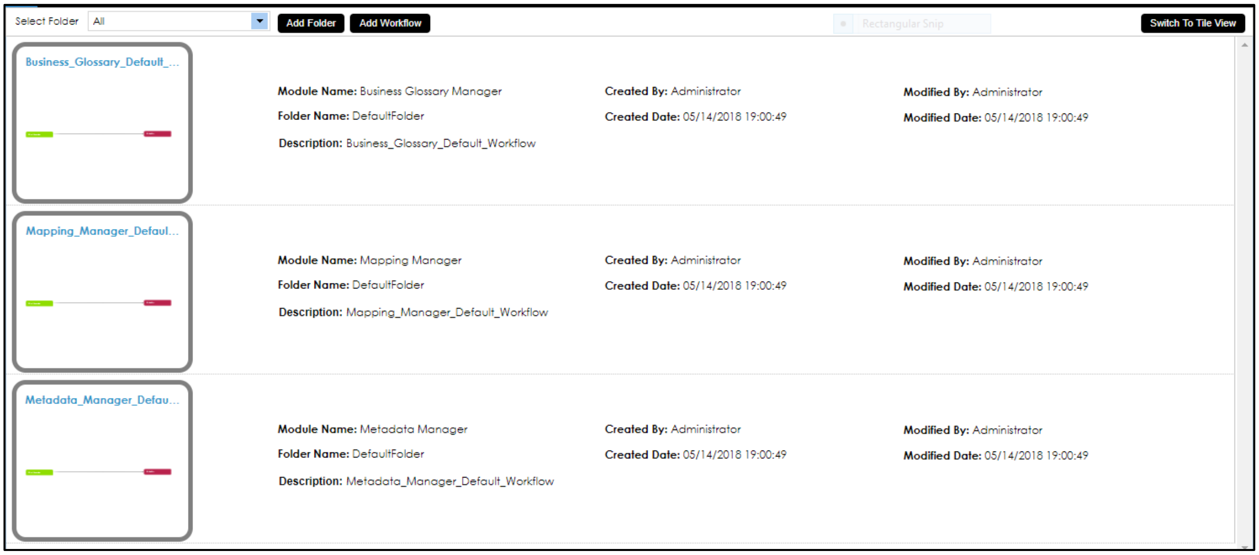
The Workflow Manager dispays upon accessing the module with default packaged workflows.

- Default packaged Workflows are shown in Tile View (Below Image).



- ✓ Business_Glossary_Default_Workflow
- ✓ Mapping_Manager_Default_Workflow
- ✓ Medata_Manager_Default_Workflow

- Alternate View- Default packaged Workflows in Detailed View (Below Image)

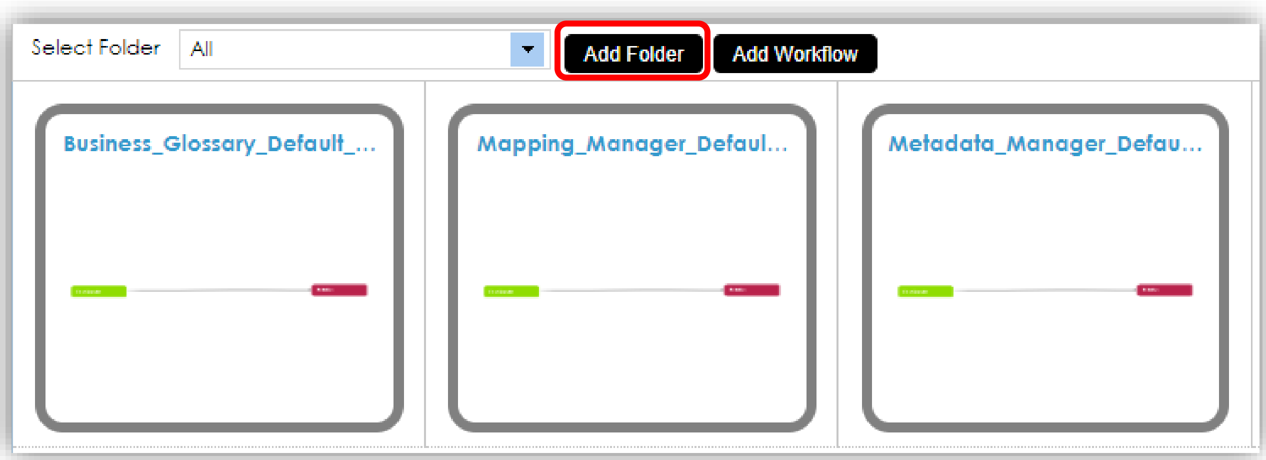


1. Mapping Manager Workflow

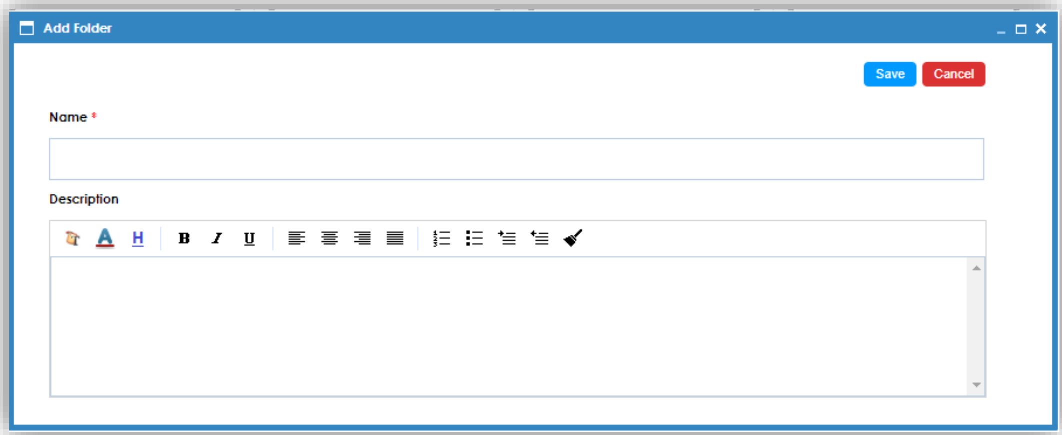
1.1 Workflow Creation & Configuration

Workflows are categorized and managed under folders.

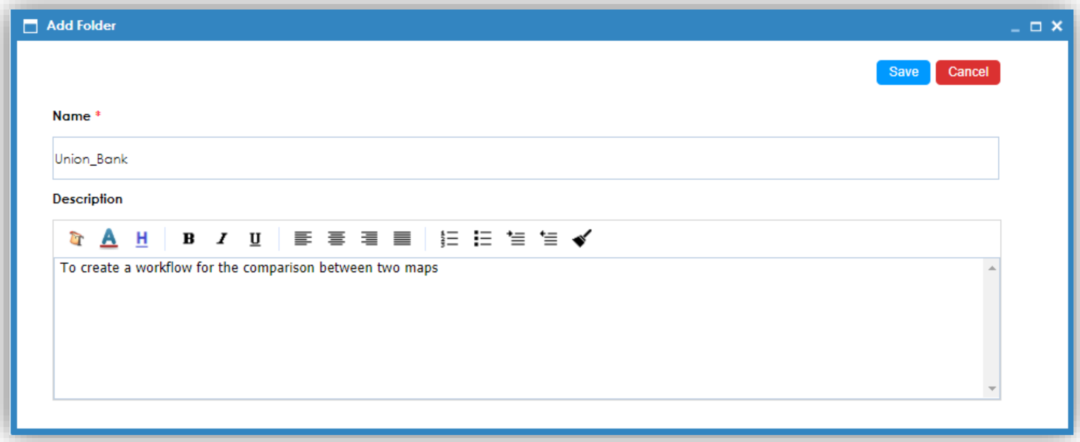
Click on **"Add Folder"** icon to add a new folder



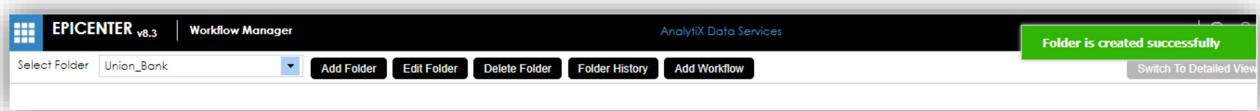
A pop-up window appears, where user needs to provide the Name and relevant description for the folder and click on save icon, to create a New Folder



Enter the folder name and description to create a New Folder.

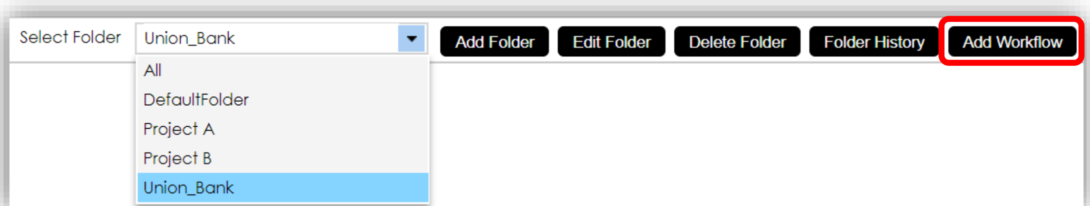


New folder for the Mapping Manager workflow is successfully created



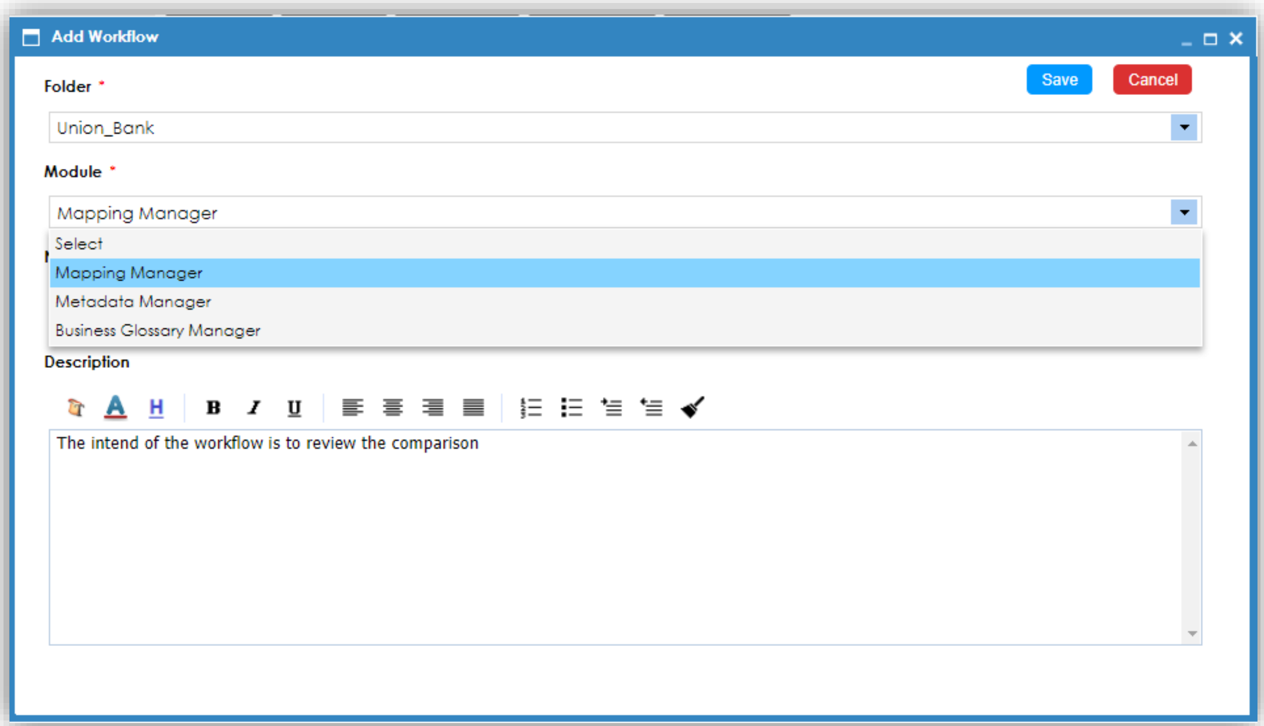
ADD WORKFLOW

Select the folder from the dropdown and Click on **"Add Workflow"** icon to define workflow for the required module. Select the module from the dropdown as shown in the below snapshot

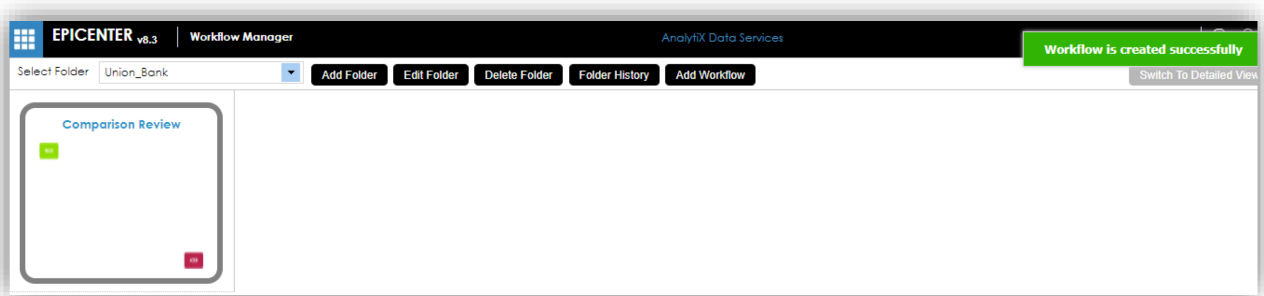


Select "**Mapping Manager**" module from the drop down and enter the Workflow name and Description of the workflow to add a new workflow.

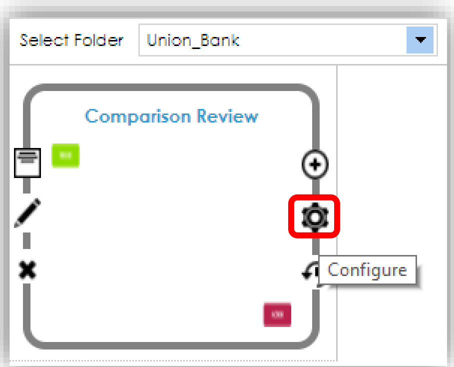
Click on Save icon, to create a New Workflow



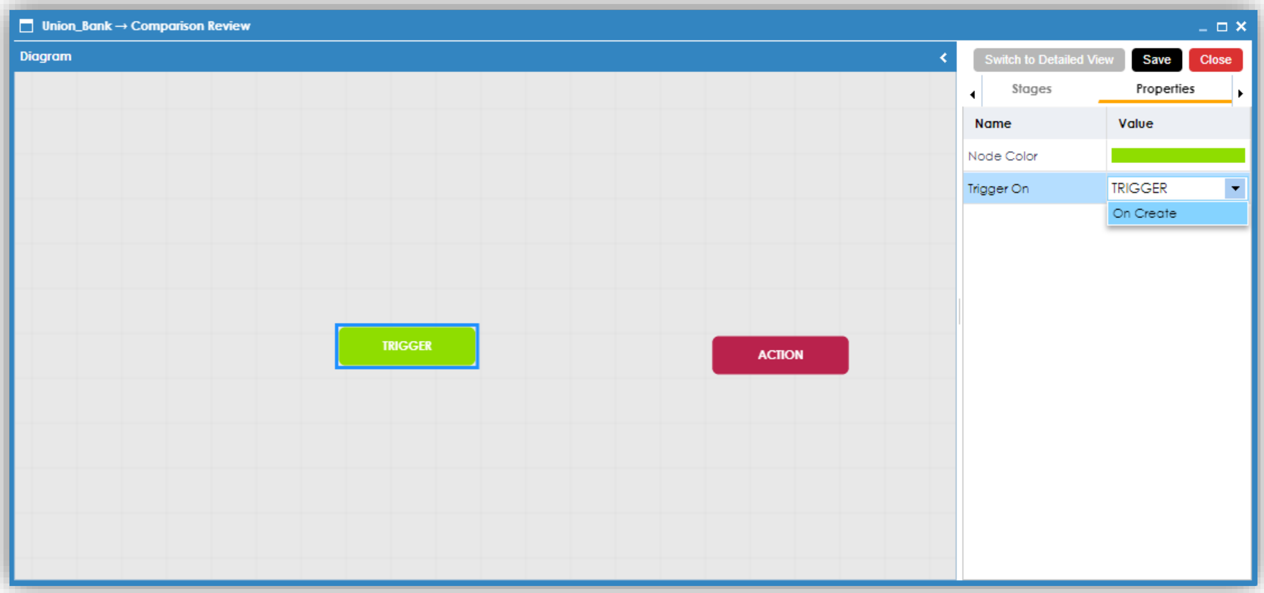
Workflow for the Mapping Manager is successfully created



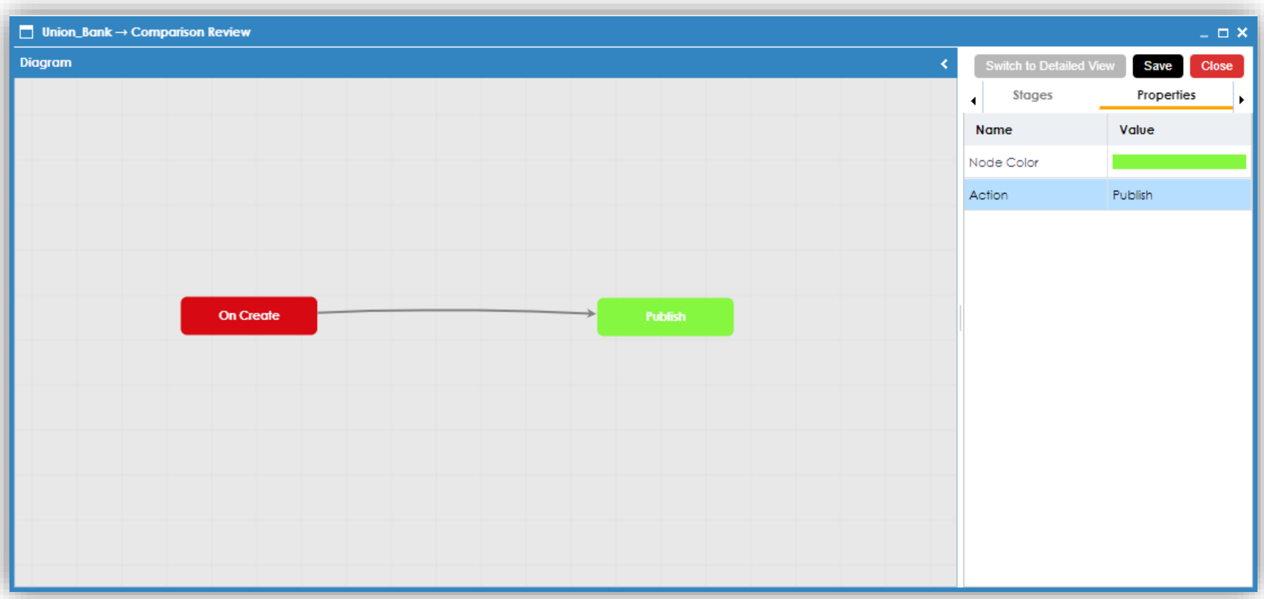
After creating the Workflow, click on the configure icon, to start creating workflow



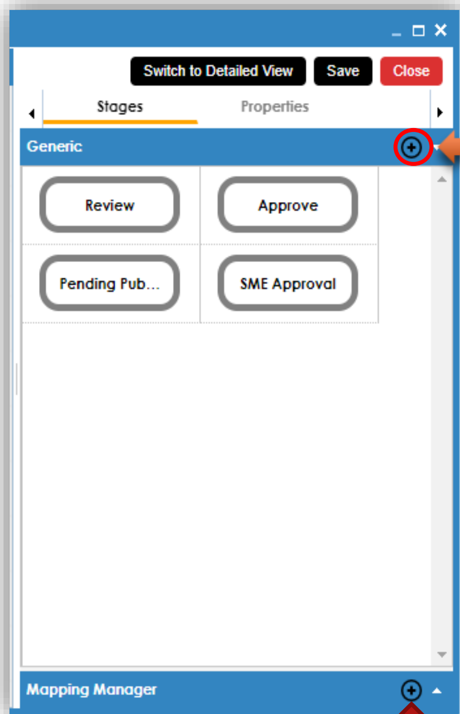
System will trigger default workflow stages and user will have the flexibility to change the naming standards from "**TRIGGER**" → "**On Create**" and "**ACTION**" → "**Publish**", to create the workflow diagram for the specified module.



Now, users can implement this straight-forward action, to complete the workflow diagram without including any generic stages

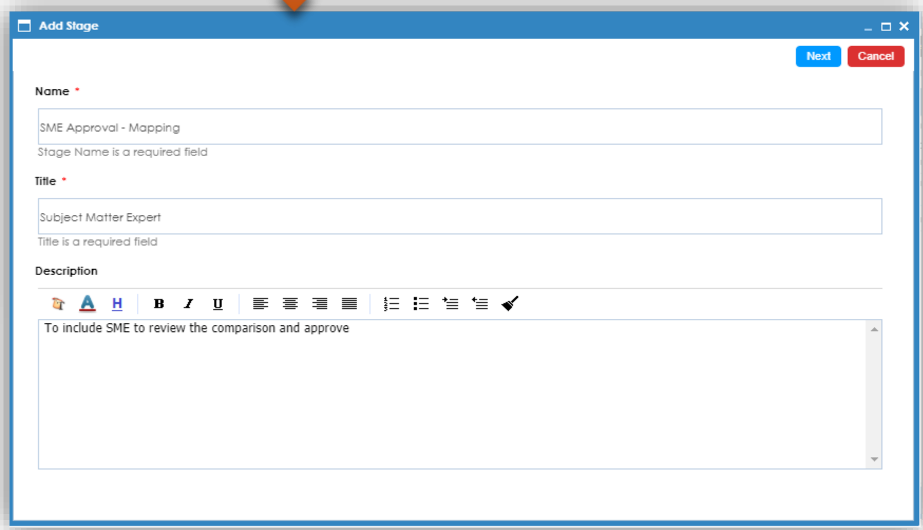


To include the customized generic or module specific stages, users need to click on the "**Stages**" section and click on ⊕ icon, to include required stages



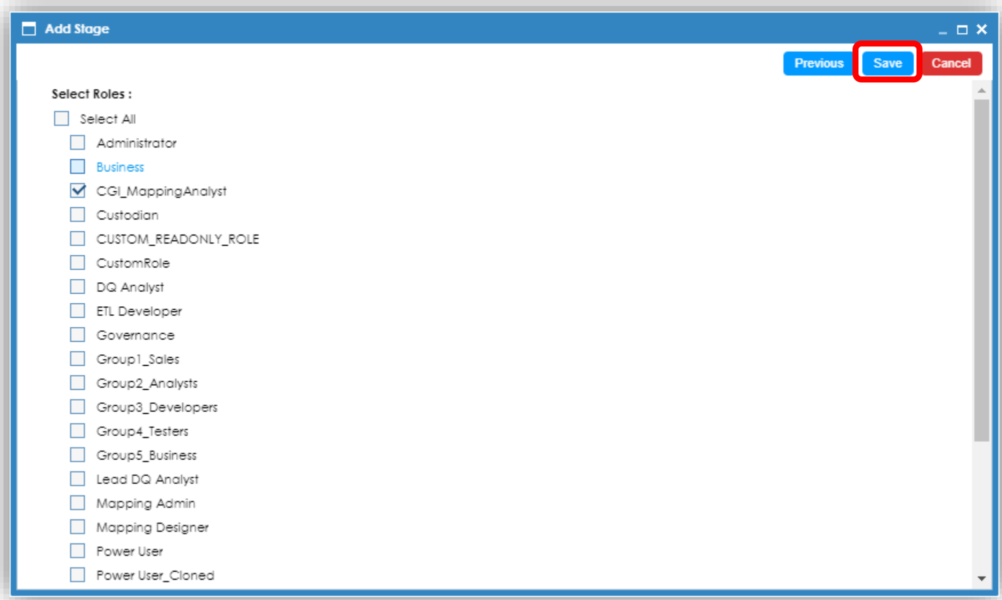
After clicking on this icon, a pop-up screen comes to enter the Name and Title for the stage.

Enter the description for the stage and click on "**Next**" to select Roles for the stage



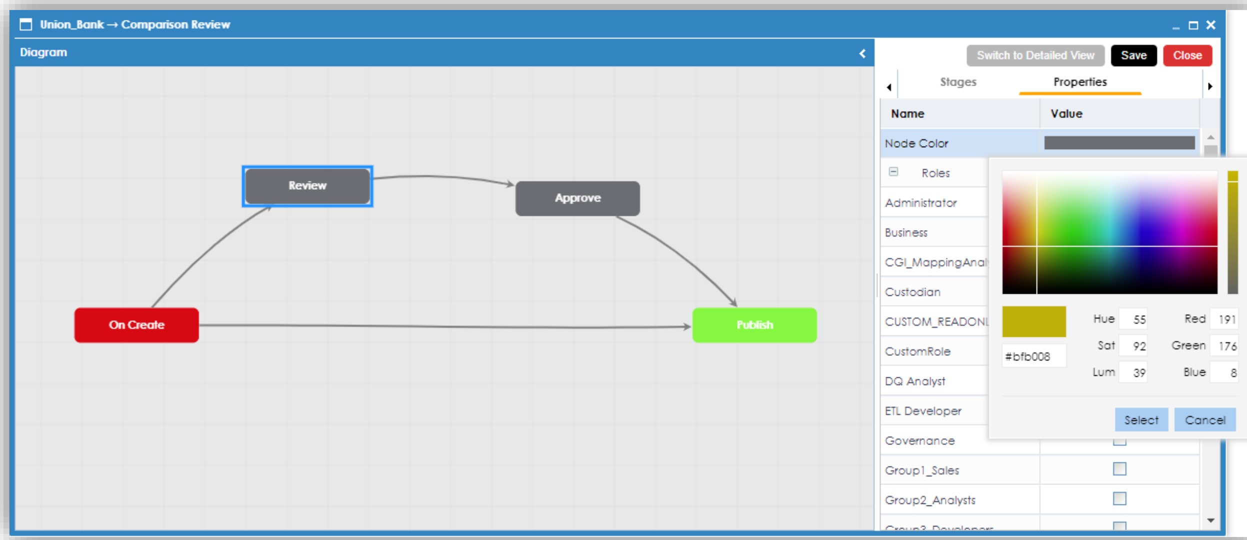
Module specific stages can also be created in the similar way to include into workflow diagram

After selecting the appropriate roles for the stage, click on save icon, to add stage to the workflow diagram.

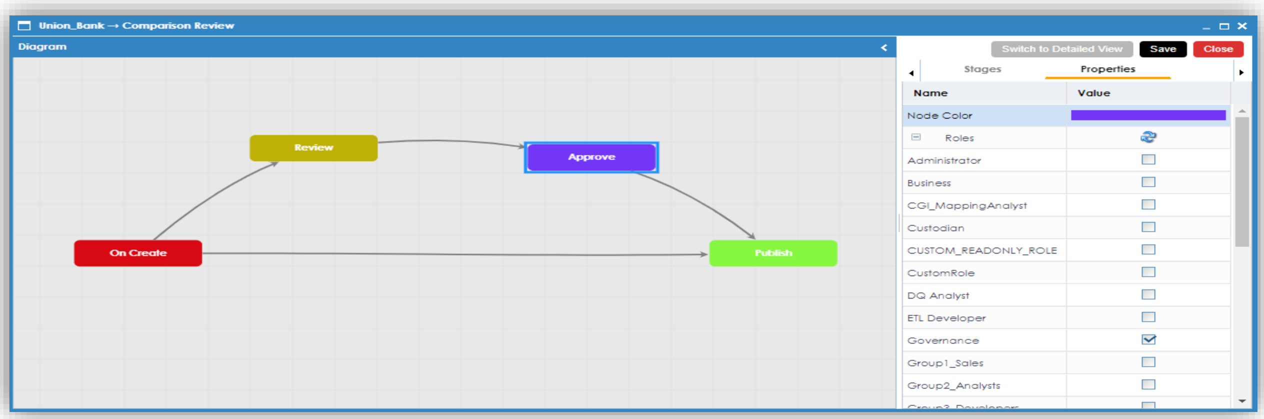


Customized generic stage is created successfully

User can now have the flexibility to update node colors and update roles if required

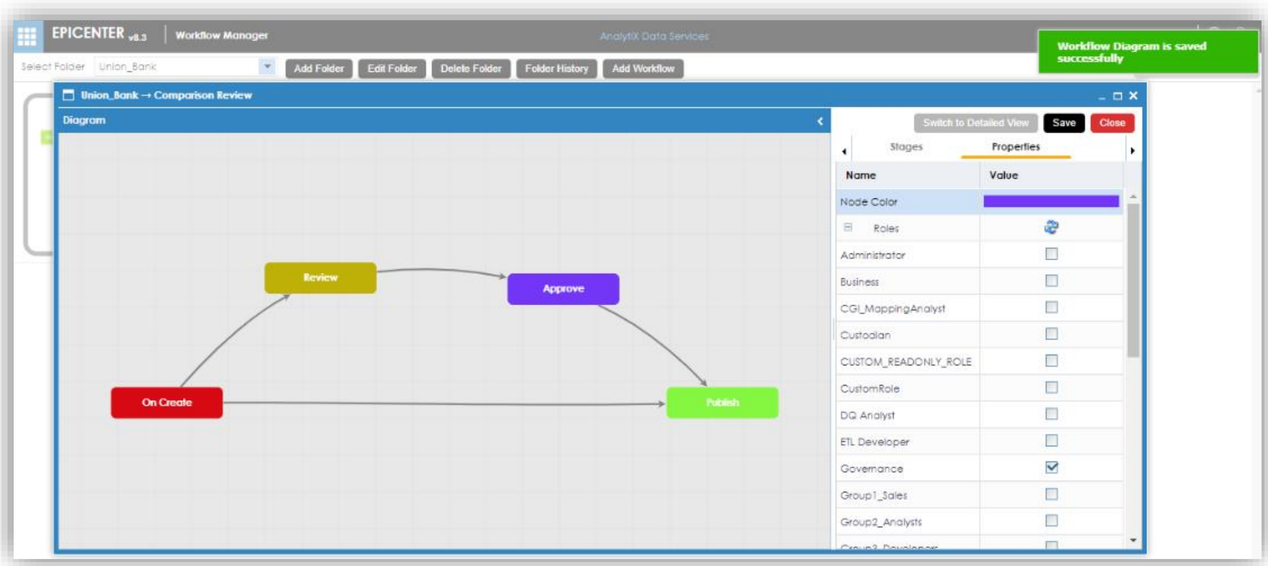


User will click on "**save**" icon to complete the workflow diagram.



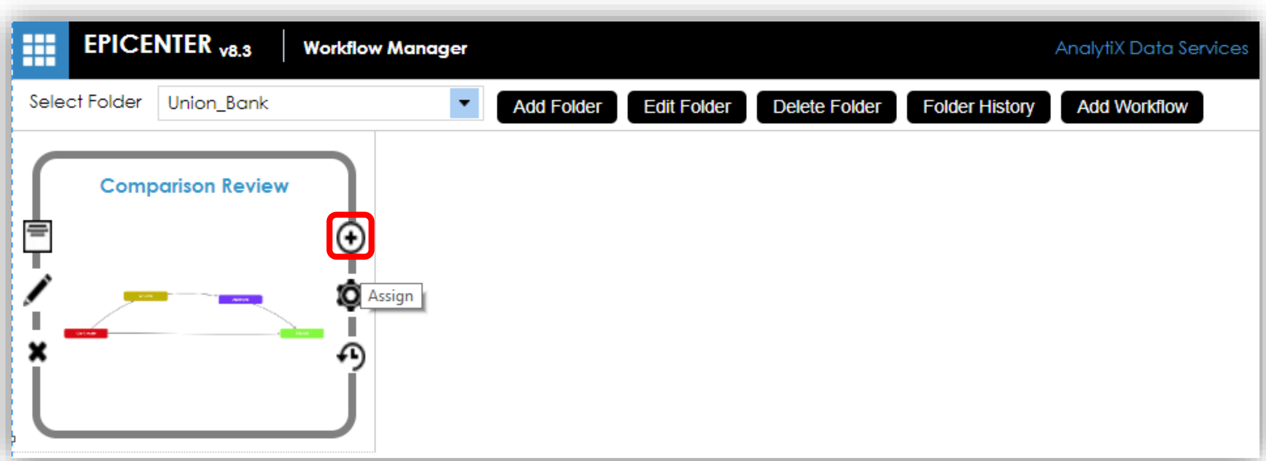
Workflow Diagram will be successfully created

Snapshot below attached shows the workflow diagram with stages assigned with specific roles

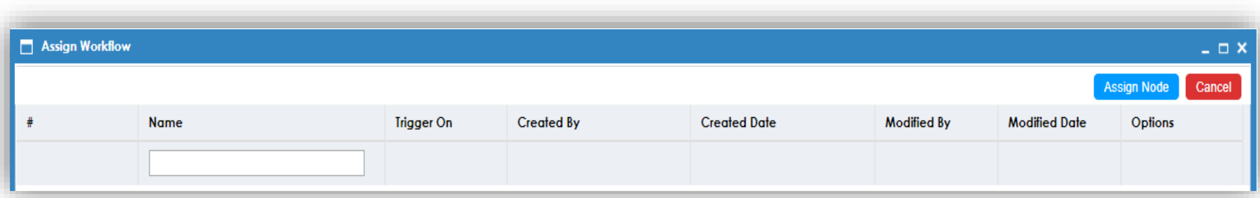


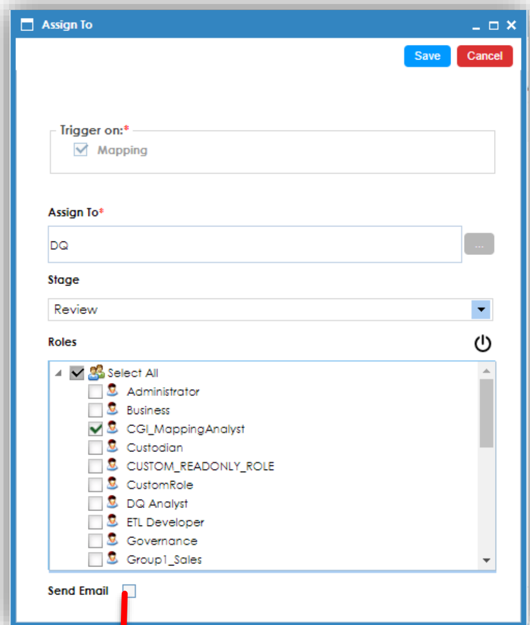
1.2 Workflow Assignment to Projects (Objects)

After creating the workflow diagram, select the created workflow and click on icon to assign workflow to the existing Projects from the Mapping Manager module. User will have option to review and update roles for the each stage if required, so that the respective users who have access to that roles will receive work queue notifications.

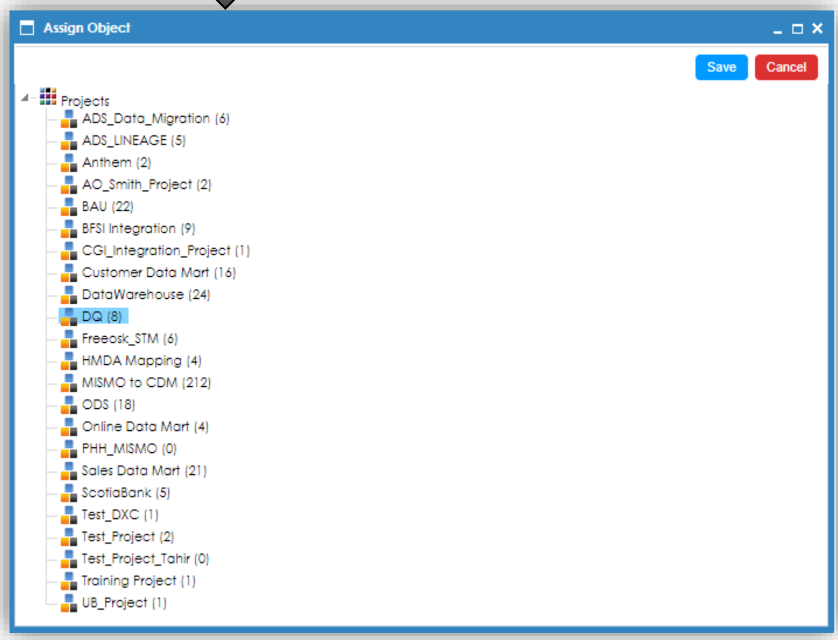


Click on "**Assign Node**" icon to select the Projects from the list

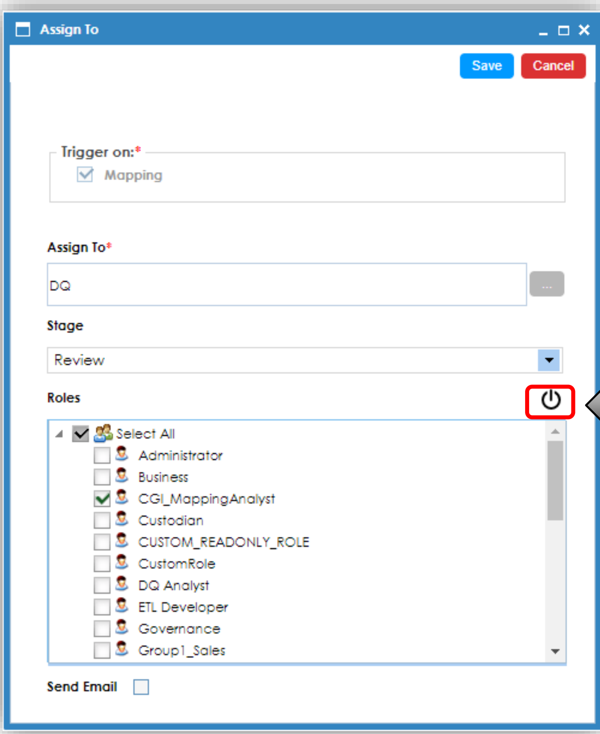




Click on the Load Nodes icon, and select the respective **Project** for assigning to the Mapping Manager module

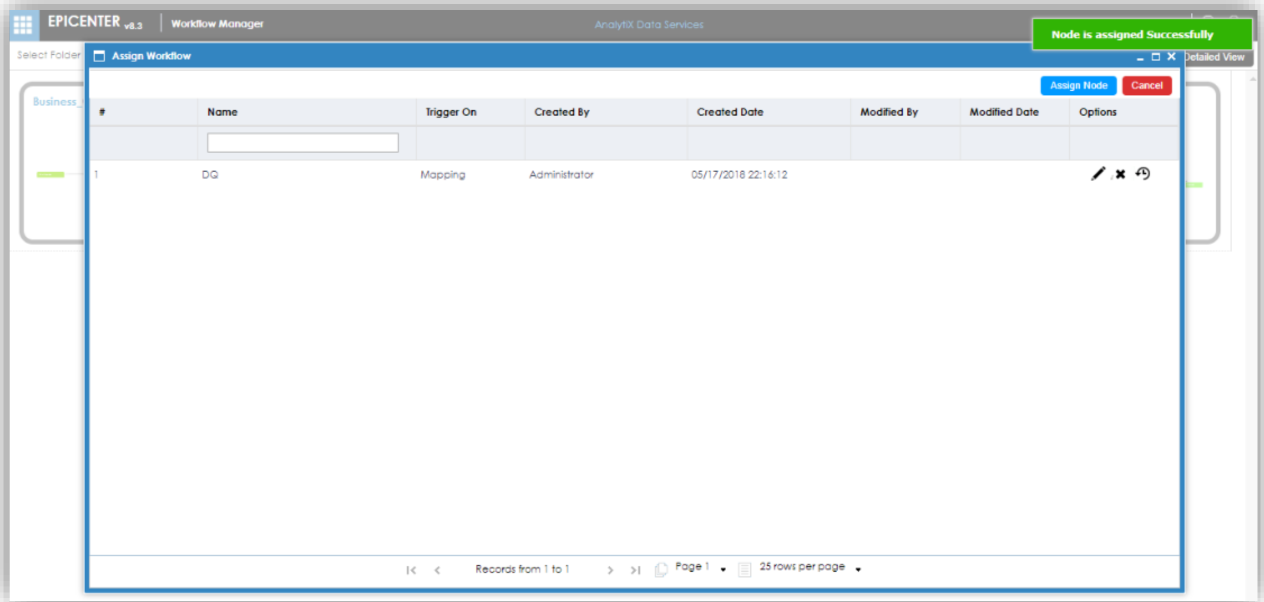


Users can also click on the "**Send Email**", Checkbox, to send email notification to the Respective user's selected from the list.



User can click this icon and reset the roles to choose from the list, any new roles added, if any to the list under roles category

After selecting the required Project and roles from the list, click on save icon.

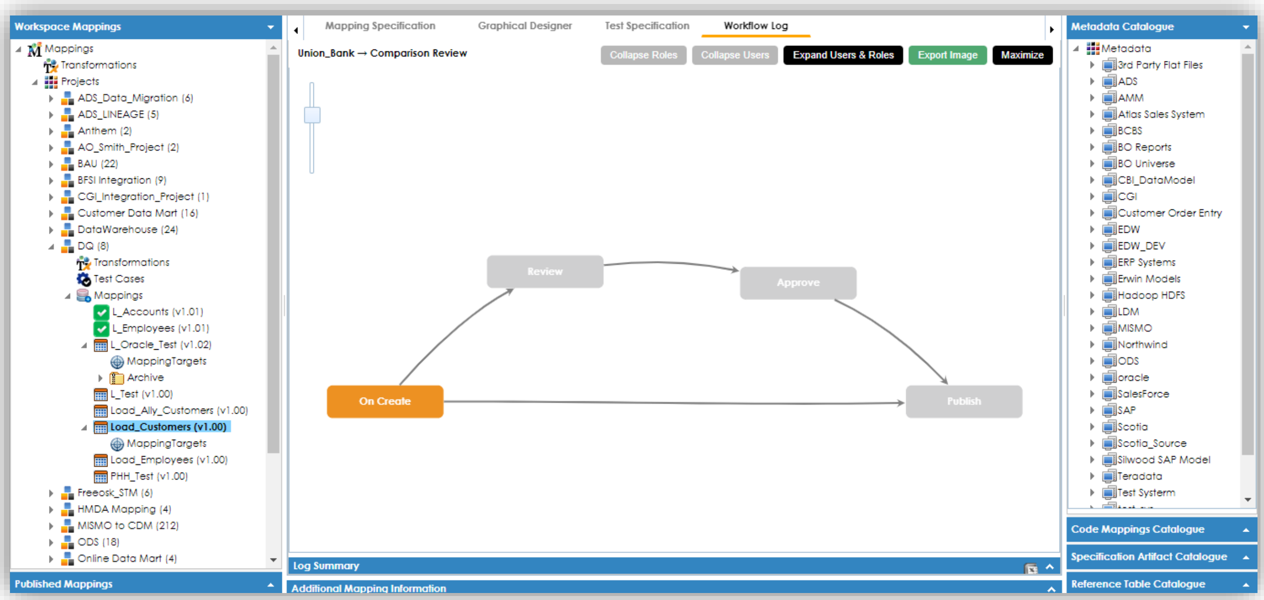


Once the workflow is assigned successfully to the respective Mapping Projects, users who are part of assigned roles will get work queue notifications to initiate the workflow.

Click on the Unified Platform menu icon, and then navigate to the **Mapping Manager** module, to review and complete the workflow

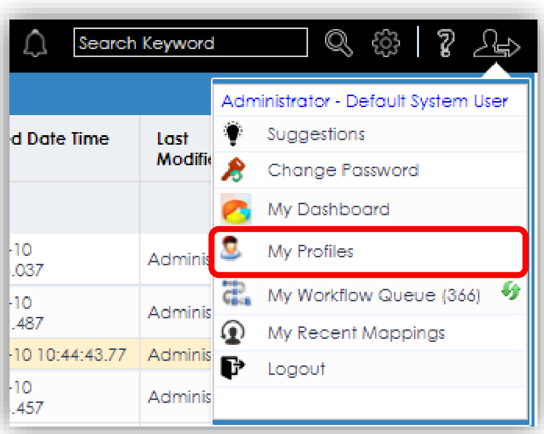
To start the review process, user firstly needs to click on the respective Project and then select the desired Mapping and then click on "**Workflow Log**" to see the status of the workflow review.

This is how the workflow log will look, before starting for the review process

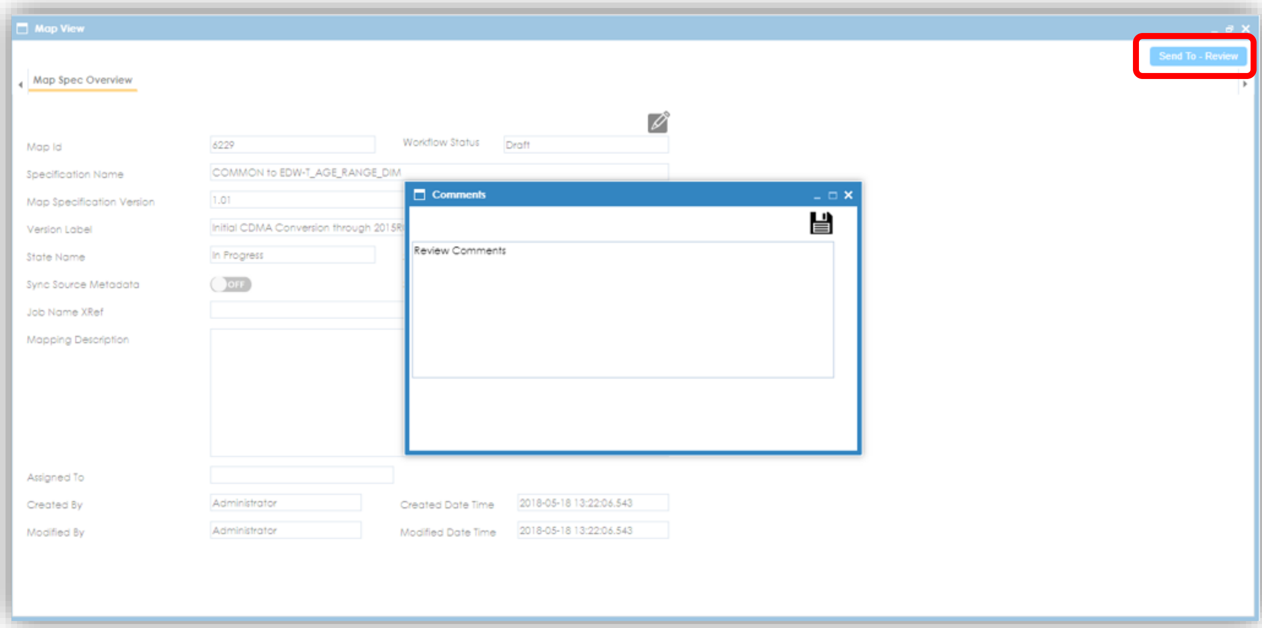


1.3 Workflow Execution through work queue notifications

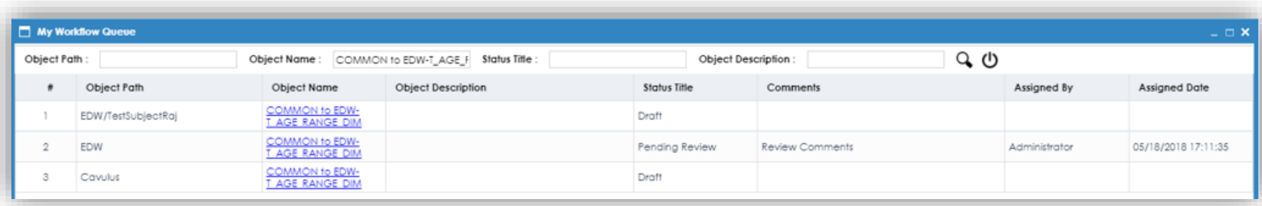
Now, click on the "**User-Profile icon**", in the top right-hand corner of the tool, to navigate to "**My Workflow Queue**", to initiate the workflow process for that particular mapping.



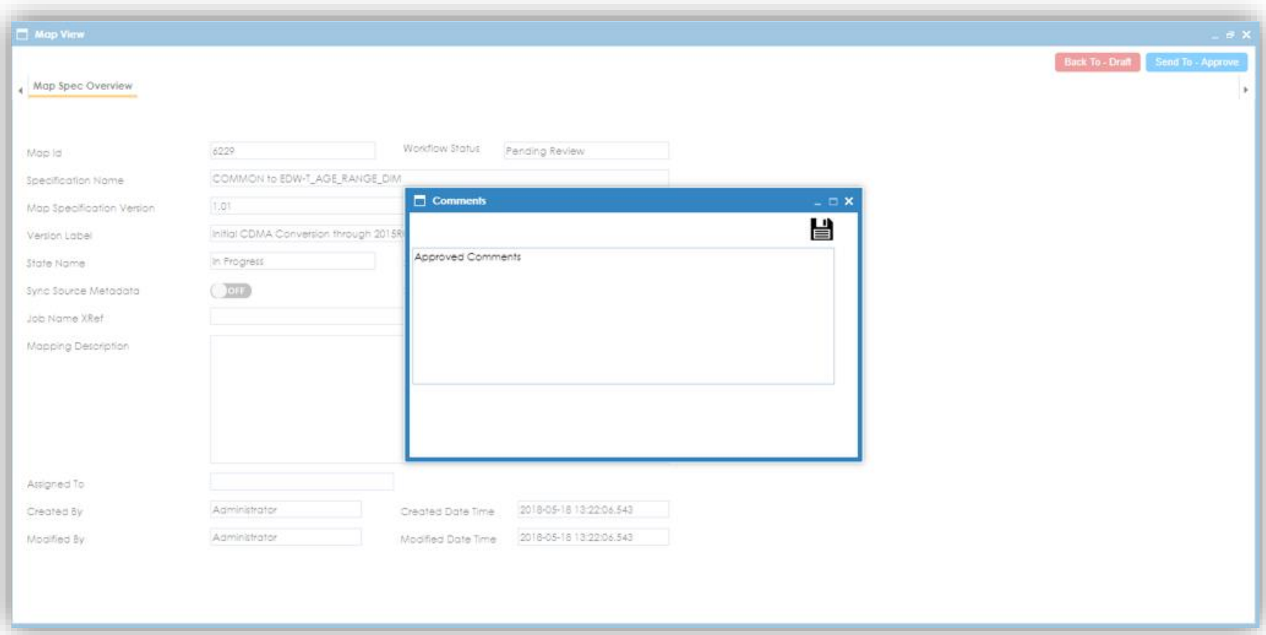
Click on the hyperlink of the Mapping Name selected for the workflow process. A pop-up window appears with mapping details and user will review the mapping information and click on "**Send to Review**" option.



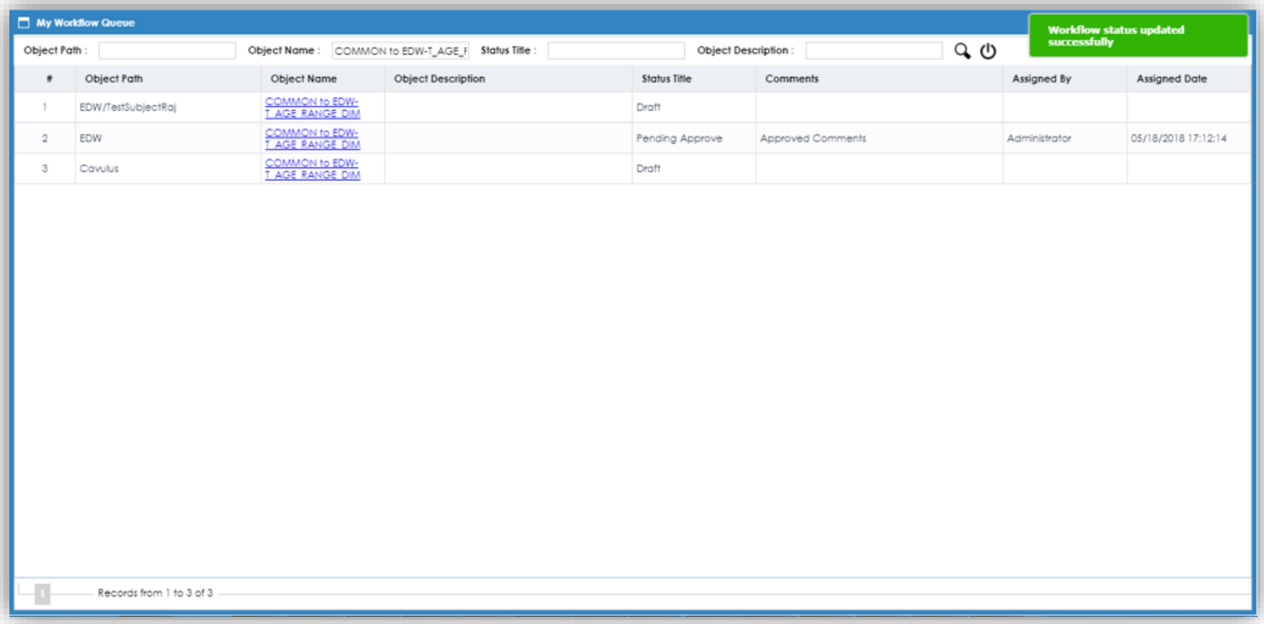
After user clicks the icon, a pop-up window opens to provide comments for the review process.



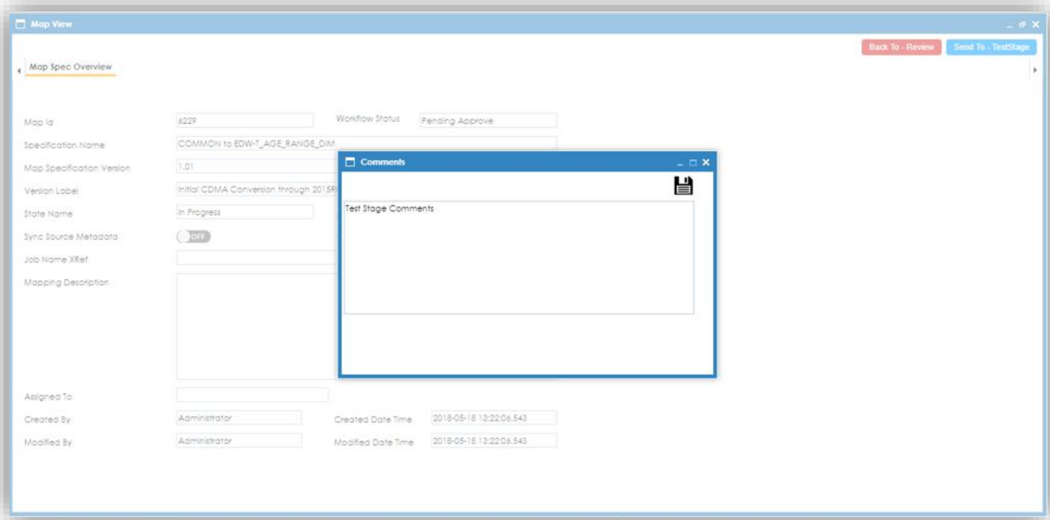
Enter the comments in the dialog box and click on save icon, to save the comments



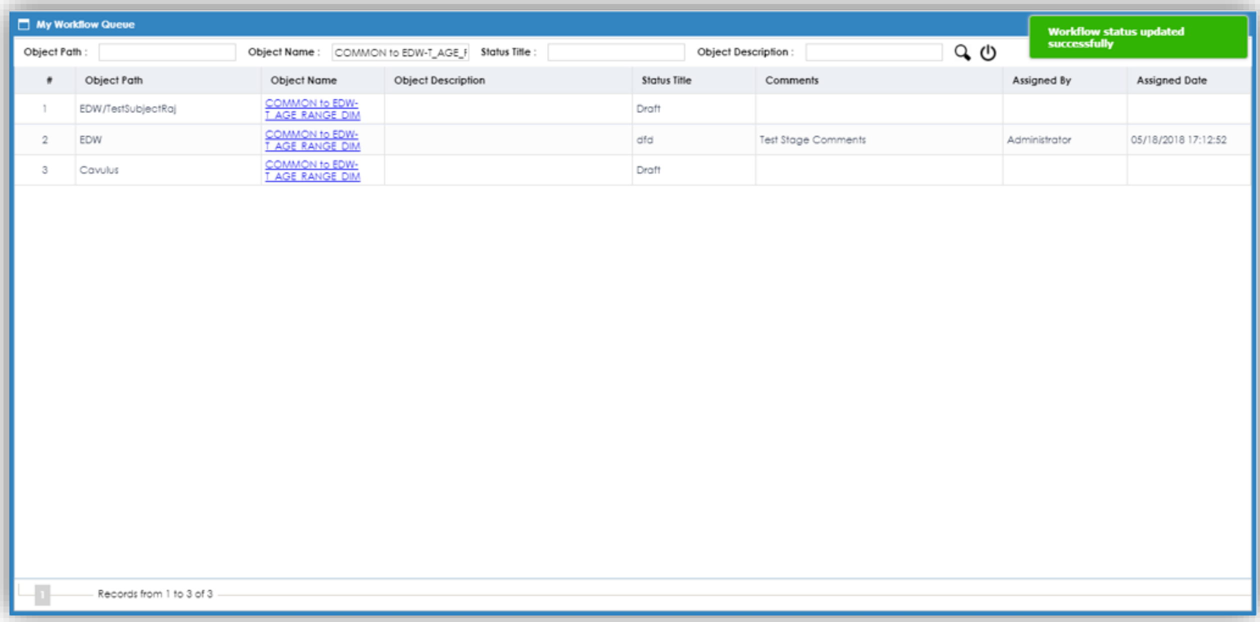
Workflow status was updated successfully.



The next user will receive work queue notification. By navigating through hyperlink, user will review the mapping and click on the **Send To - Approve** icon to send for the approval by providing the necessary comments.

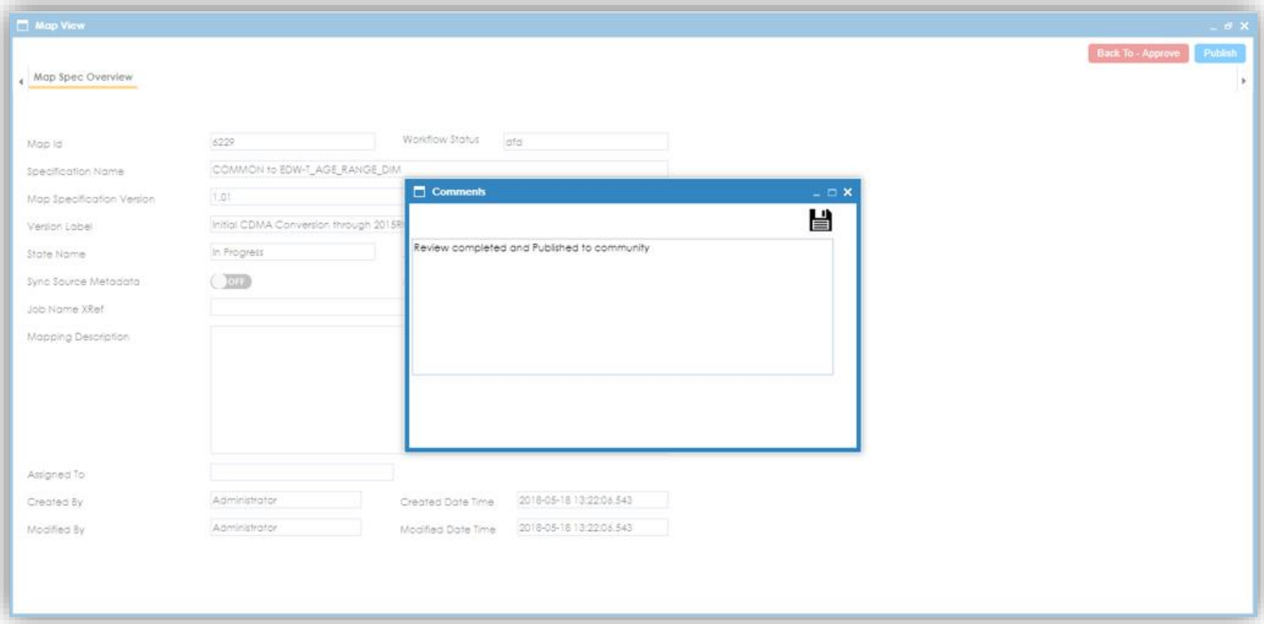


Once the user provides the comments, click on save icon, to update the workflow status successfully.

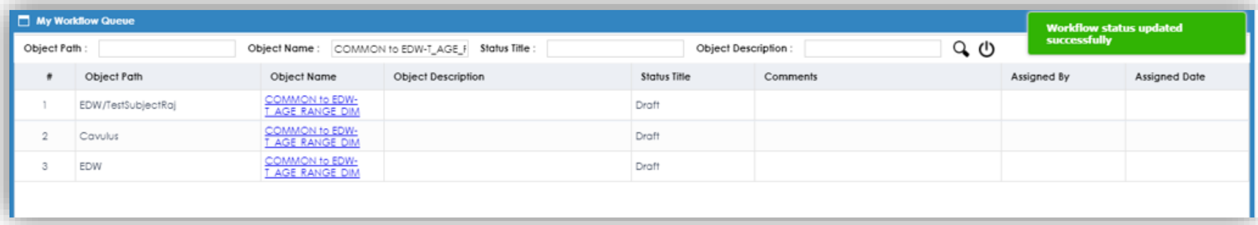


After the workflow gets updated, user needs to click on the same hyperlink for the required mapping to publish.

Click on the Publish icon, to publish the workflow status for the required mapping

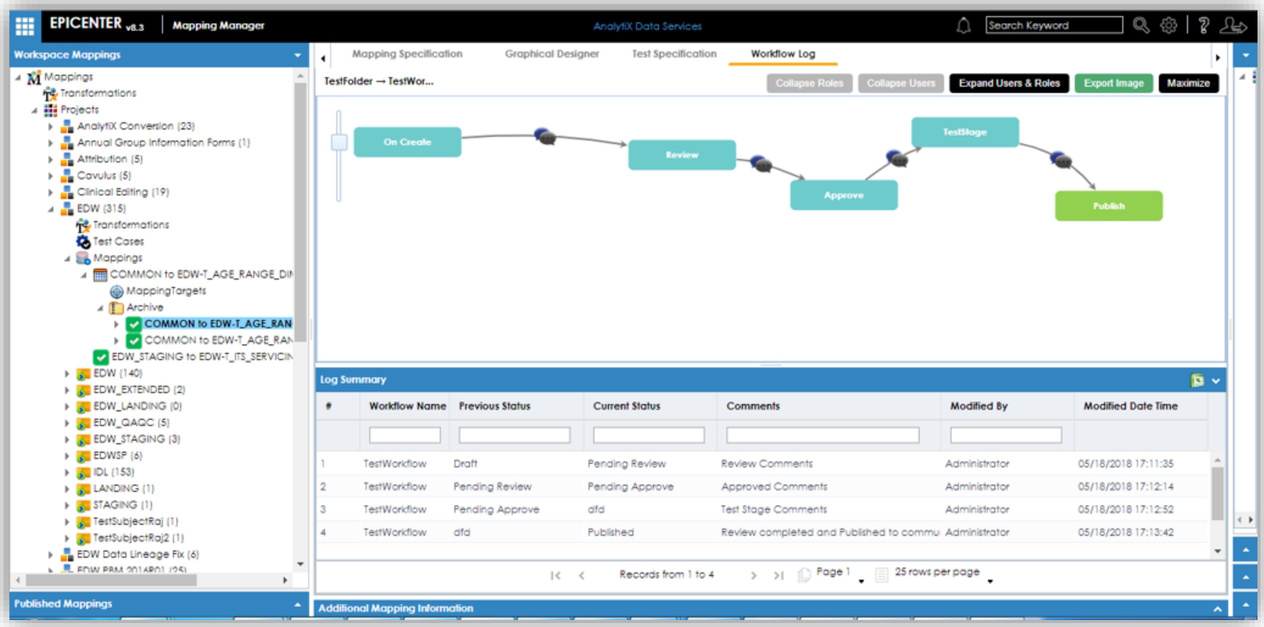


Once the user publishes the current mapping, the required mapping goes to the published folder of the project and the workflow diagram is updated accordingly



Once the table gets published, the workflow process gets completed.

User can view the "**Workflow log**" for the required mapping

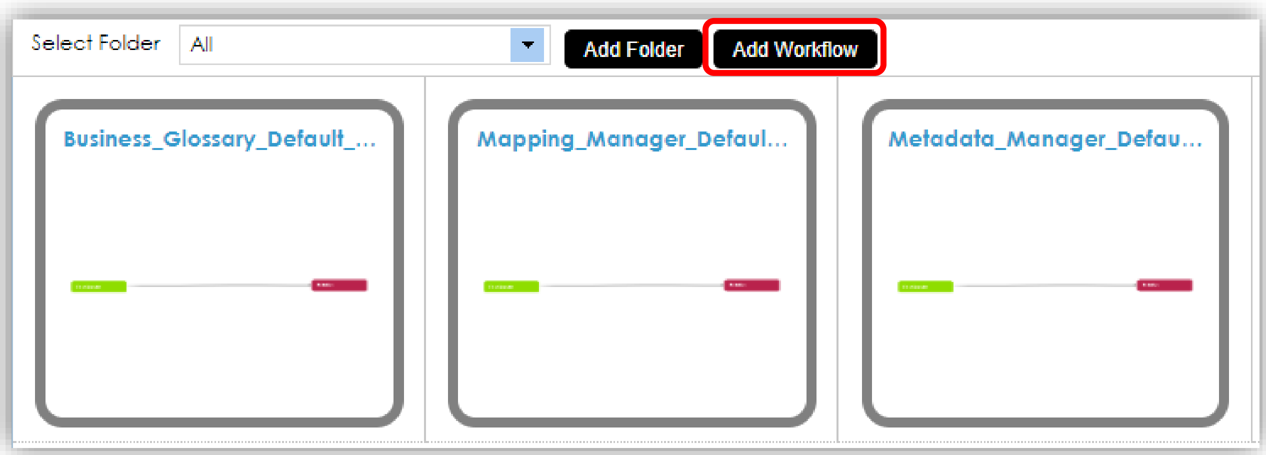


2. Metadata Manager Workflow

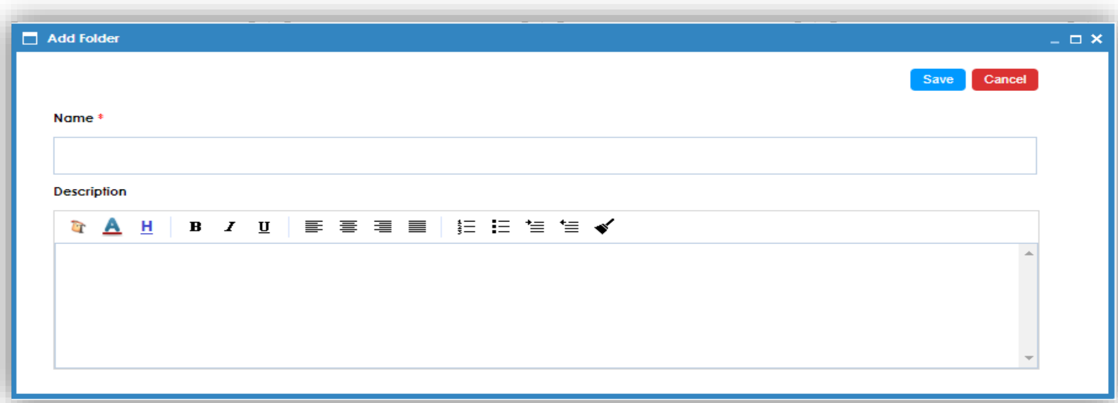
2.1 Workflow Creation & Configuration

Workflows are categorized and managed under folders.

Click on **"Add Folder"** icon to add a new folder

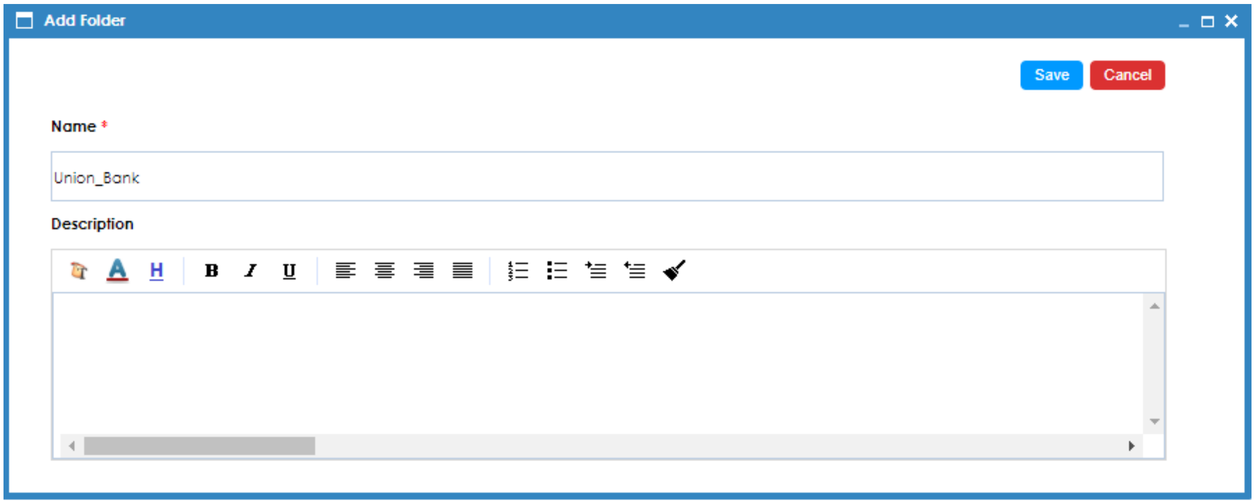


A pop-up window appears, where user needs to provide the Name and relevant description for the folder and click on save icon, to create a New Folder

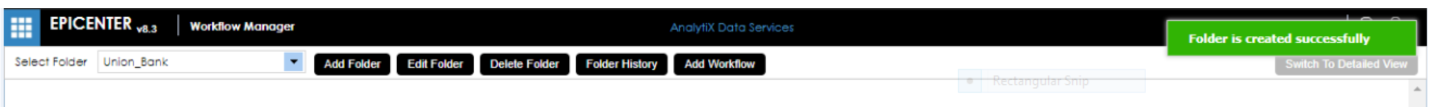


Enter the folder name and description to create a New Folder.

Click the Save icon, when all the details are provided to add a new folder



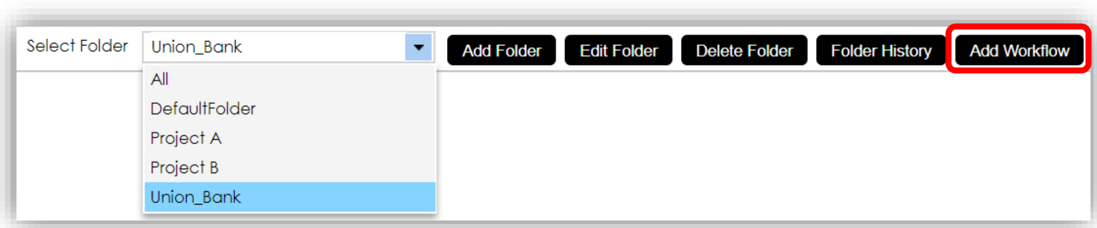
New folder for the Metadata Manager workflow is successfully created



You do have provision to Edit/Delete and view the folder history.

ADD WORKFLOW

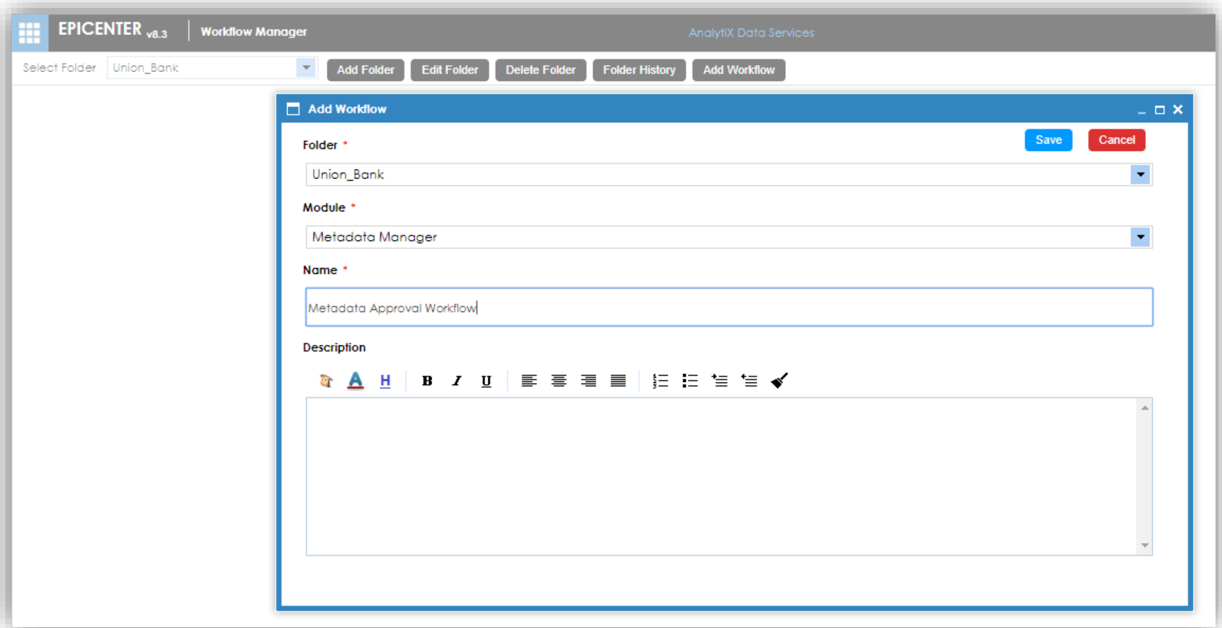
Select the folder from the dropdown and Click on **"Add Workflow"** icon to define workflow for the required module. Select the module from the dropdown as shown in the below snapshot



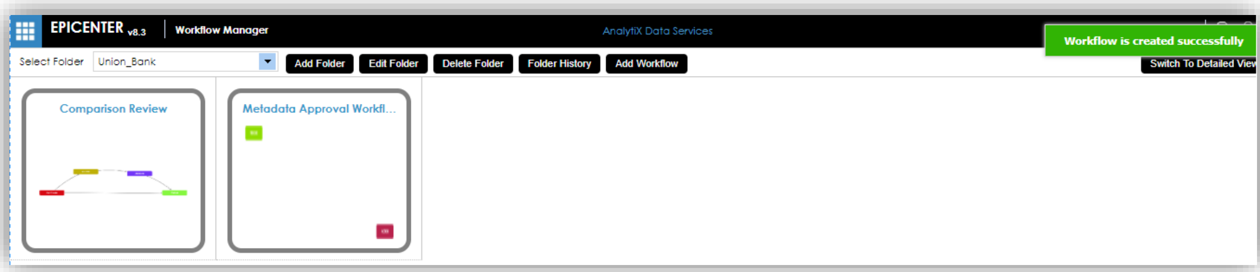
Select "**Metadata Manager**" module from the drop down and enter the Workflow name and Description of the workflow to add a new workflow.

Click on 

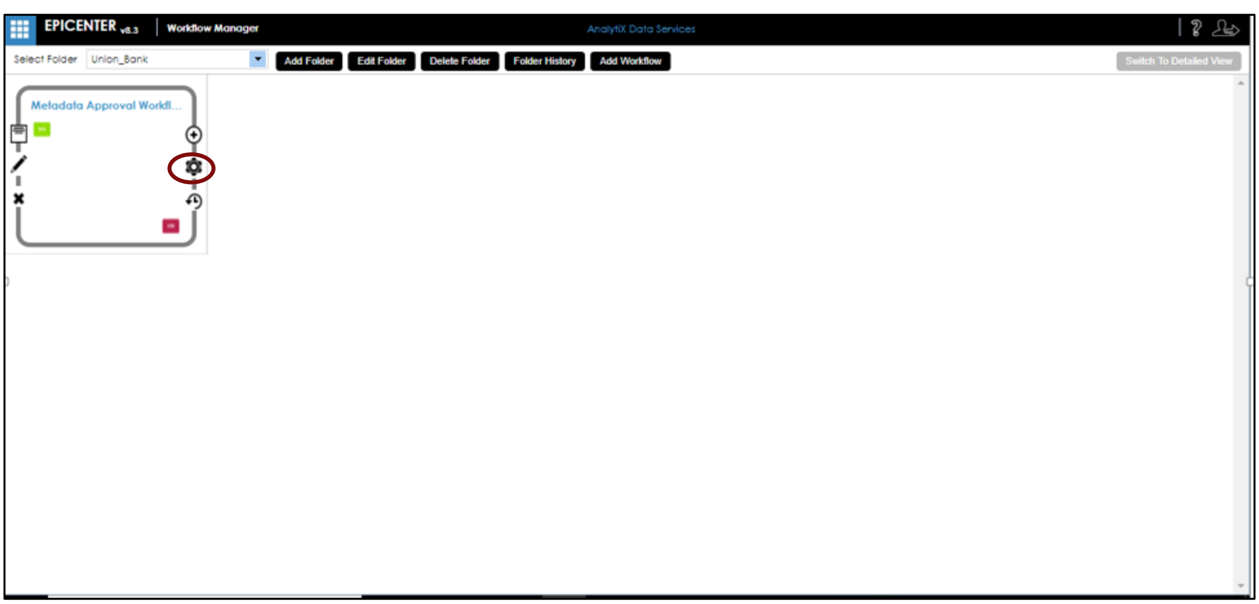
icon, to create a New Workflow



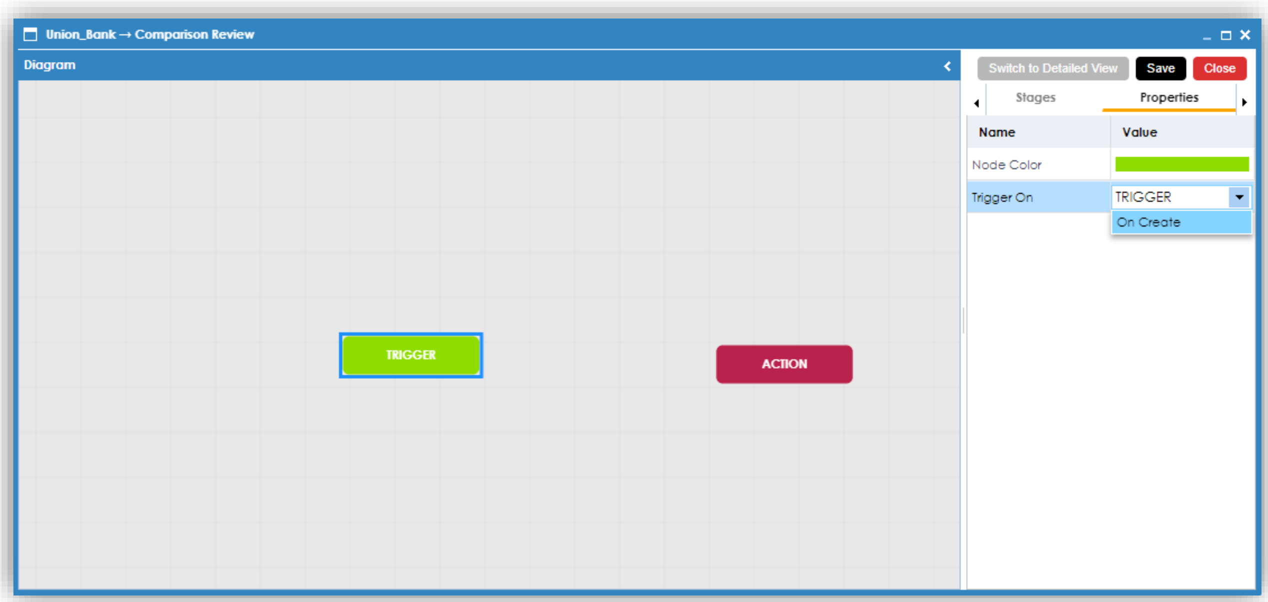
Workflow for the Metadata Manager is successfully created



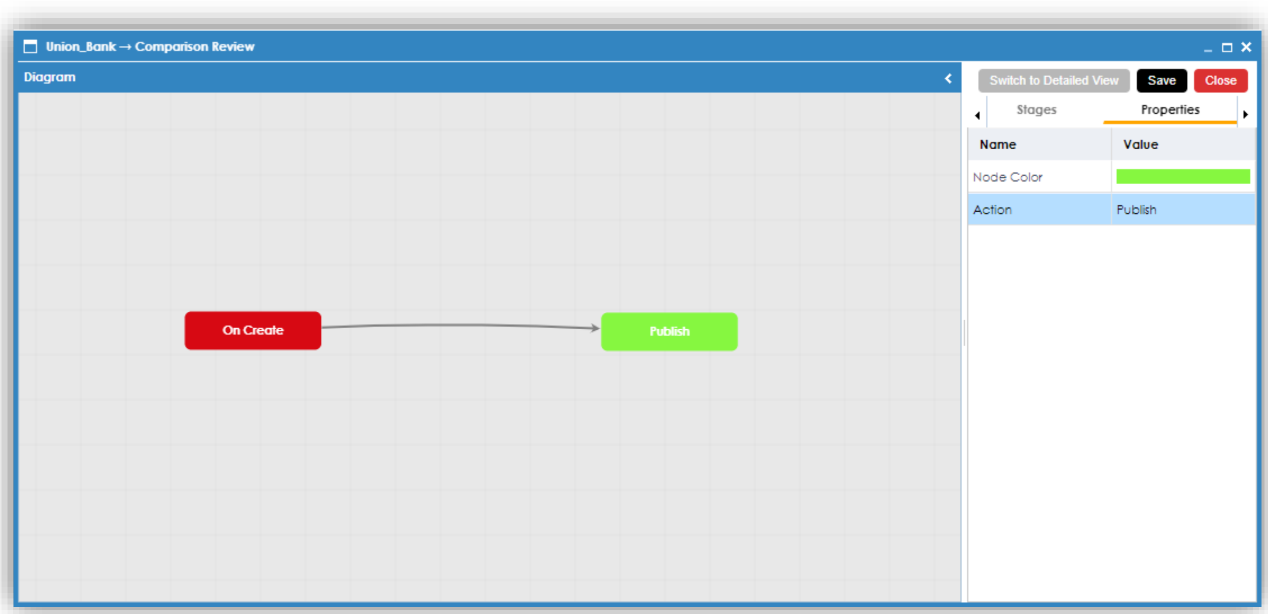
After creating the Workflow, click on the configure icon , to start creating workflow



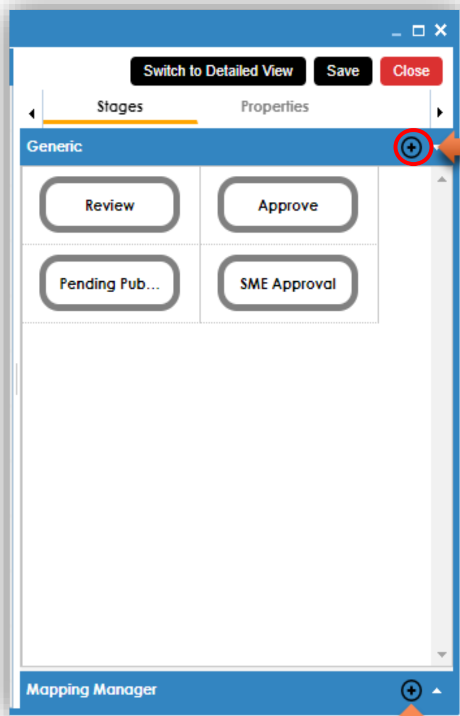
System will trigger default workflow stages and user will have the flexibility to change the naming standards from "**TRIGGER**" → "**On Create**" and "**ACTION**" → "**Publish**", to create the workflow diagram for the specified module.



Now, users can implement this straight-forward action, to complete the workflow diagram without including any generic stages

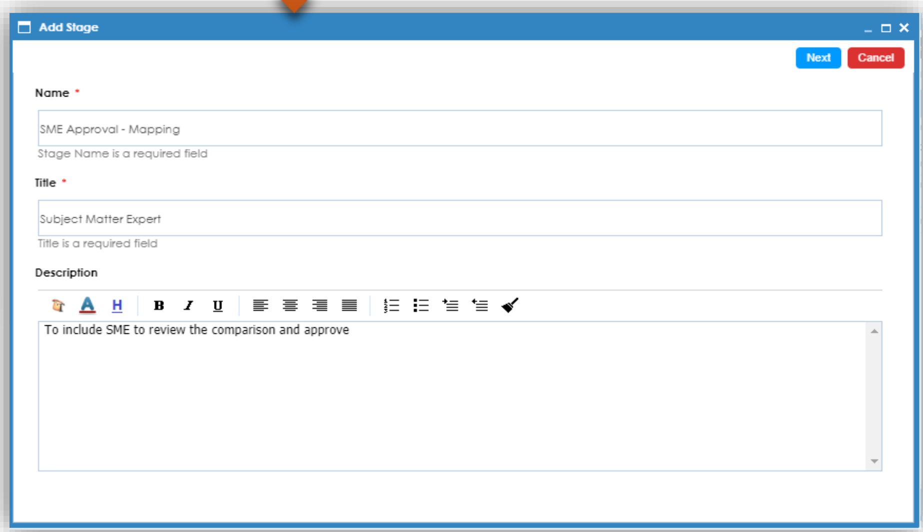


To include the customized generic or module specific stages, users need to click on the "**Stages**" section and click on ⊕ icon, to include required stages



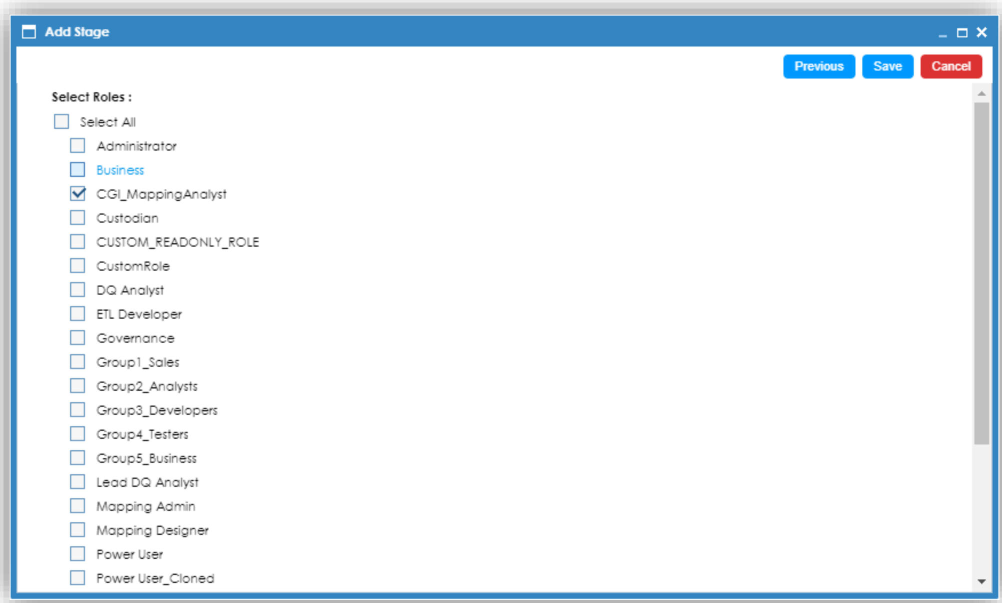
After clicking on this icon, a pop-up screen comes to enter the Name and Title for the stage.

Enter the description for the stage and click on "**Next**" to select Roles for the stage



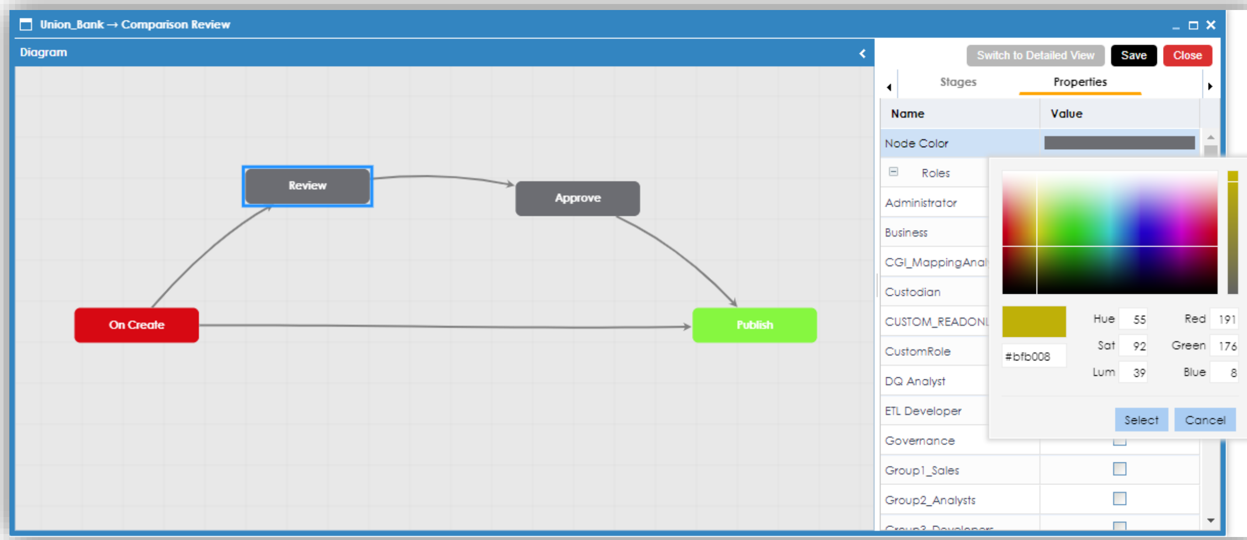
Module specific stages can also be created in the similar way to include into workflow diagram

After selecting the appropriate roles for the stage, click on save icon, to add stage to the workflow diagram.

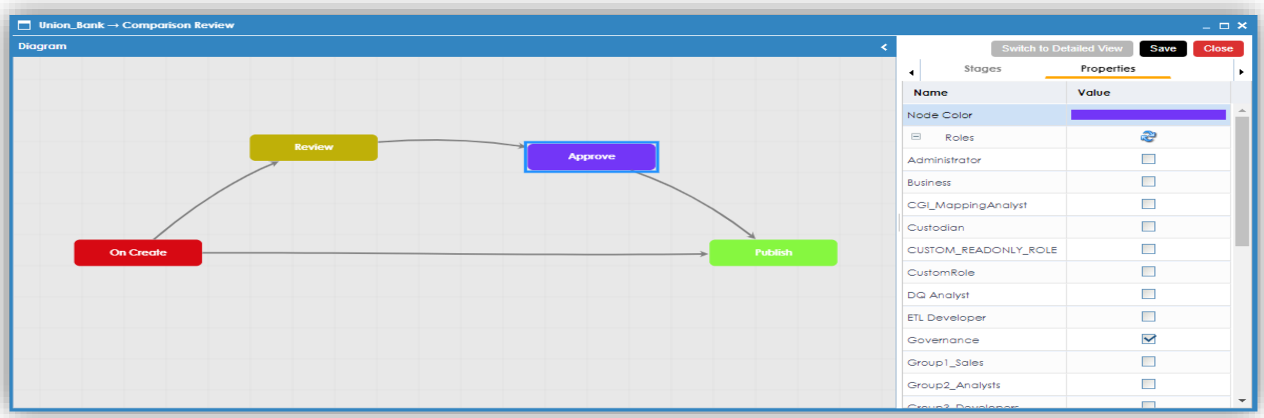


Customized generic stage is created successfully

User can now have the flexibility to update node colors and update roles if required

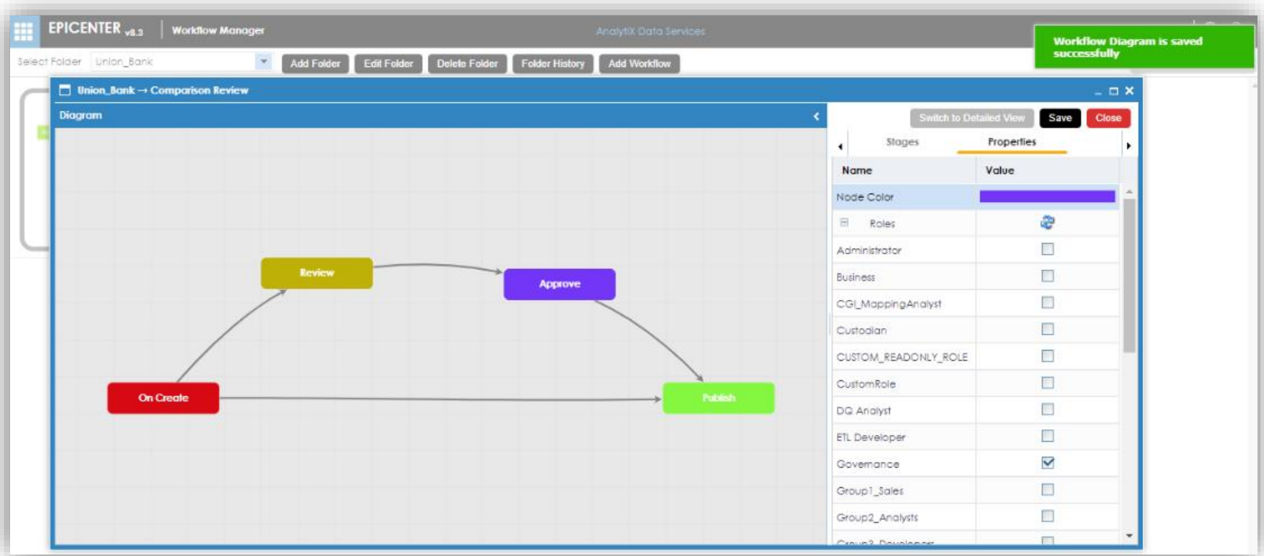


User will click on "**save**" icon to complete the workflow diagram.

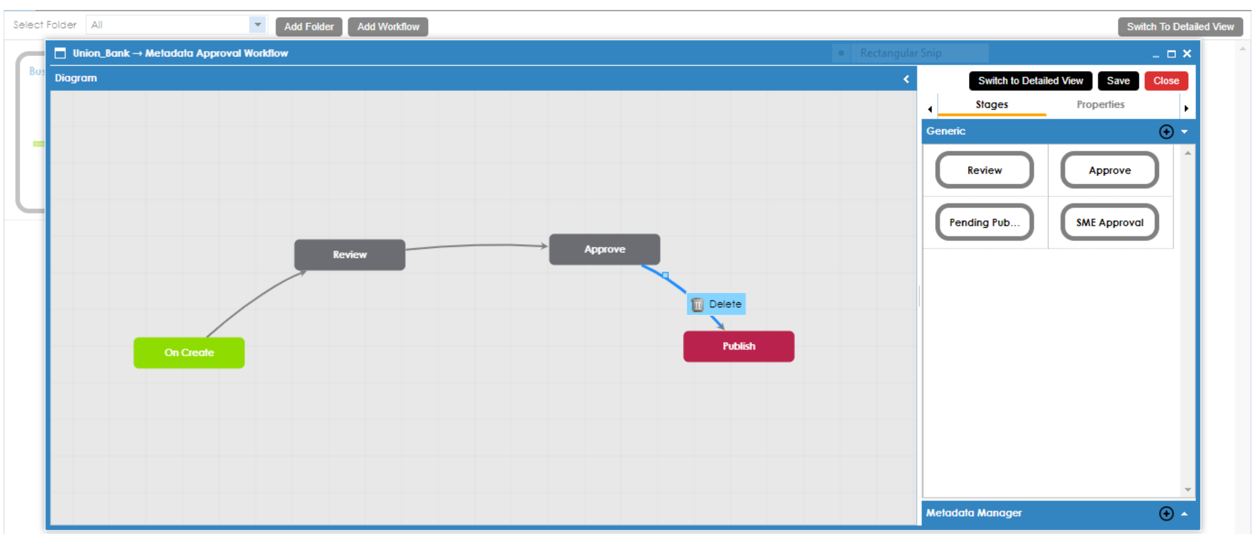


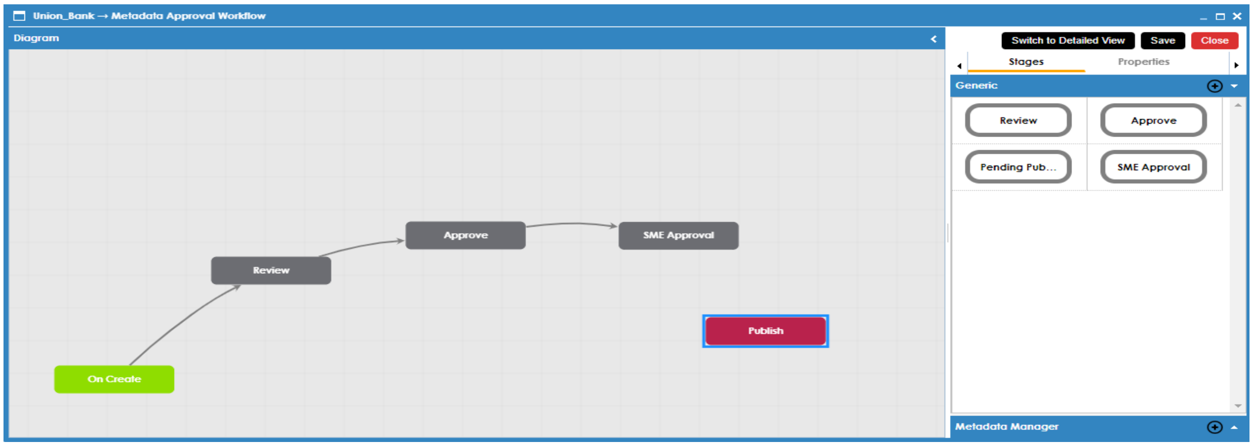
Workflow Diagram will be successfully created

Snapshot below attached shows the workflow diagram with stages assigned with specific roles

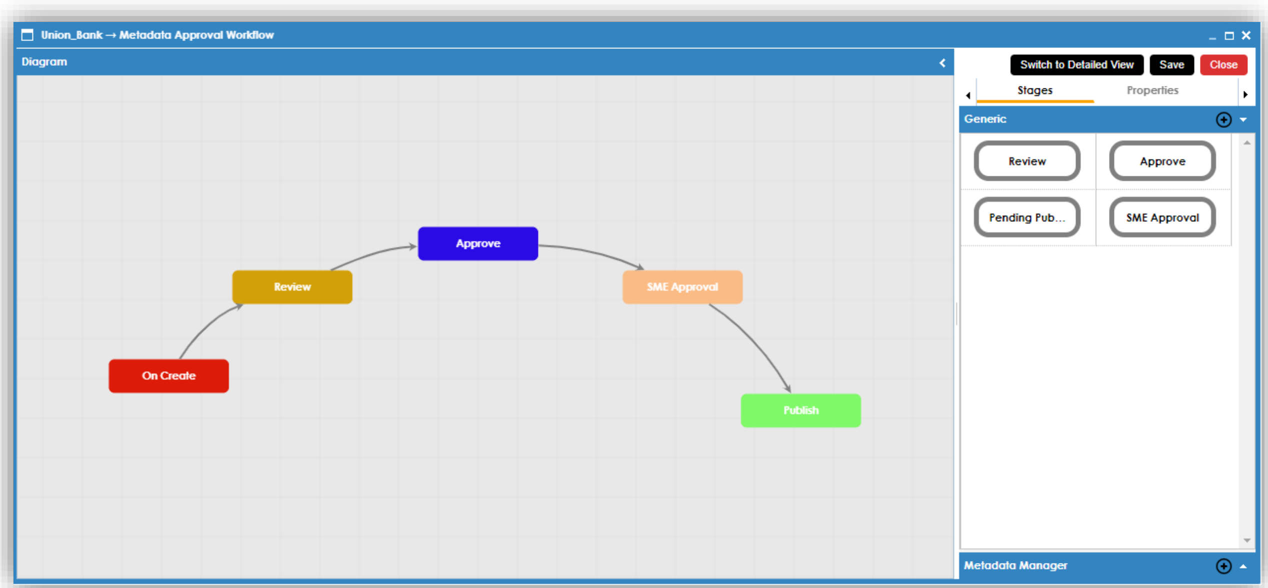


Un-assigning the relationship between two stages can be done by Right Click and delete option.



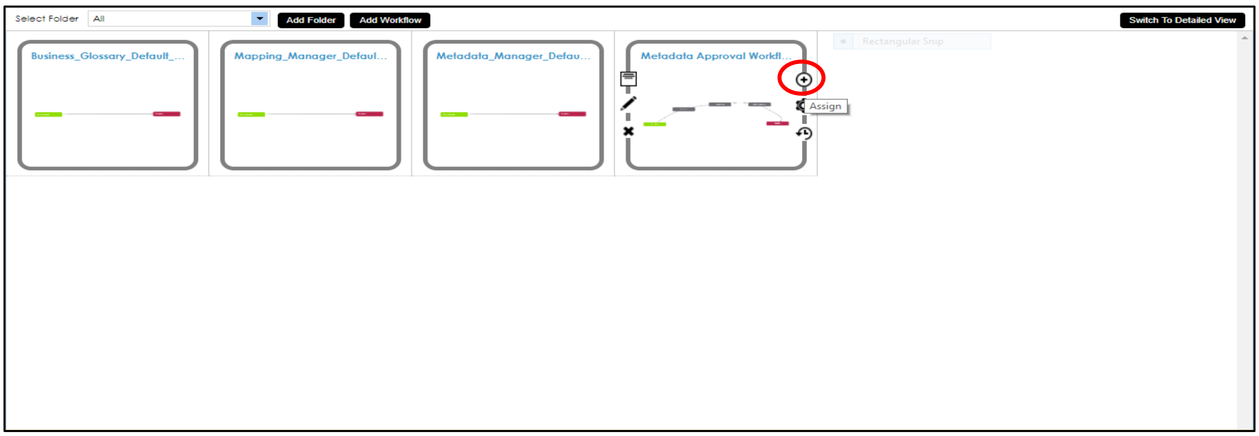


User can drag and drop the custom created generic stages into the Workflow diagram, to make part of the review process.

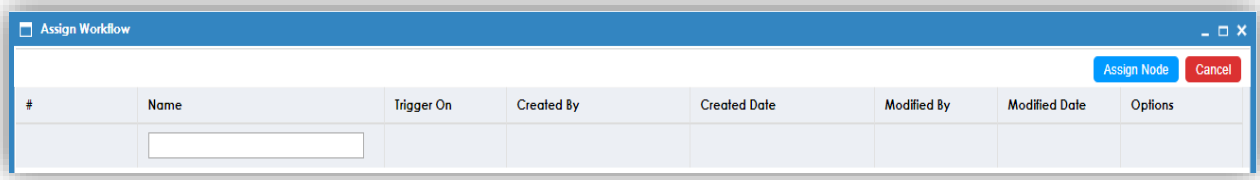


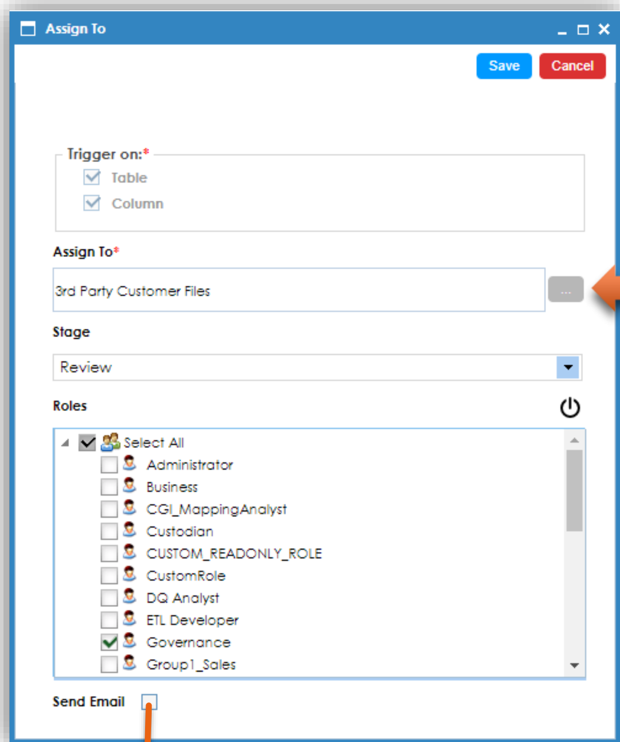
2.2 Workflow Assignment to Metadata Environments (Objects)

After creating the workflow diagram, select the created workflow and click on ⊕ icon to assign workflow to the existing Environments from the Metadata Manager module. User will have option to review and update roles for the each stage if required, so that the respective users who have access to that roles will receive work queue notifications.

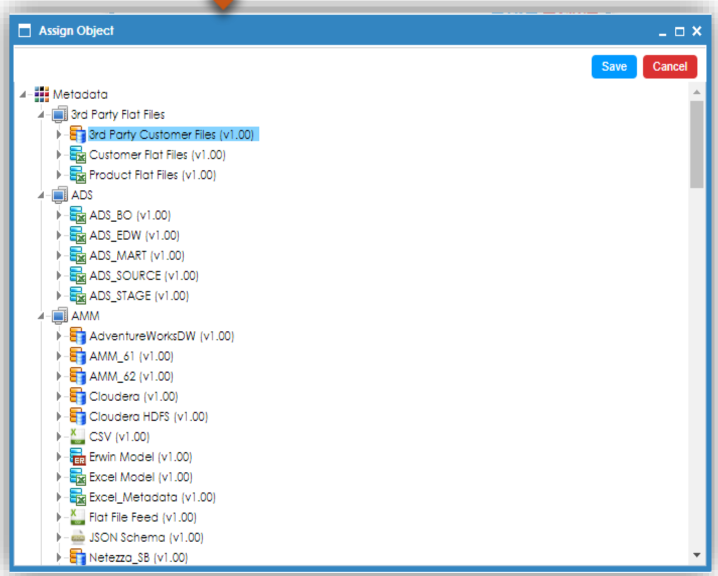


Click on "**Assign Node**" icon to select the Projects from the list

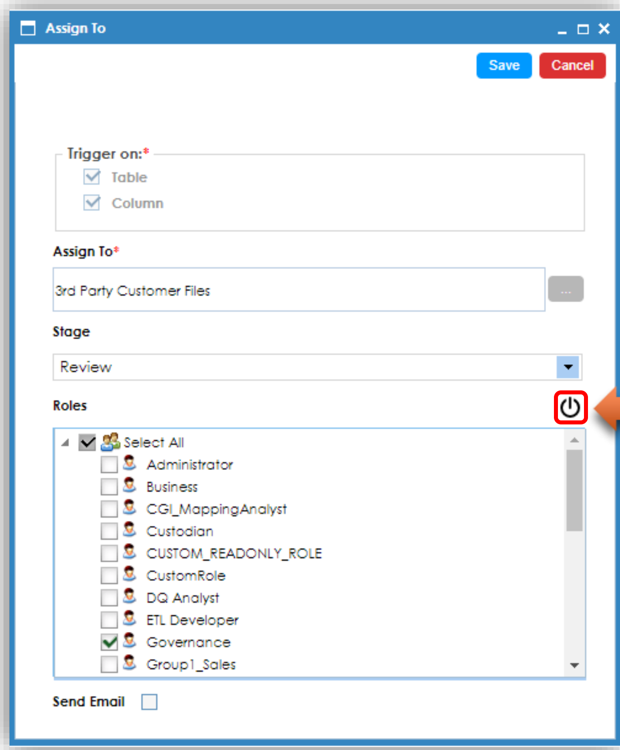




Click on the Load Nodes icon, and select the respective **Environment** for assigning to the Metadata Manager module

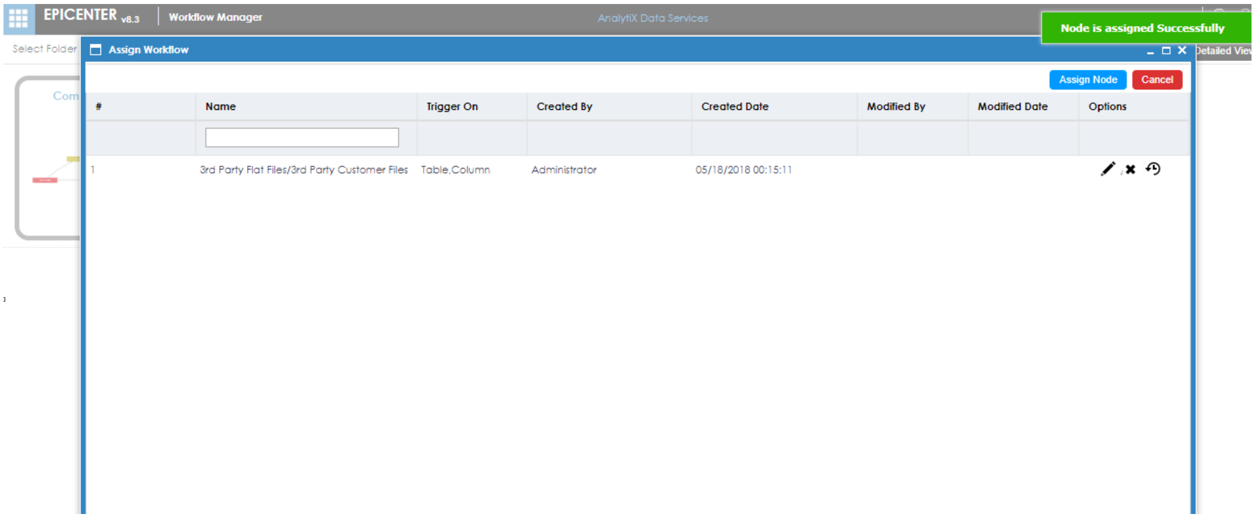


Users can also click on the "**Send Email**", Checkbox, to send email notification to the Respective user's selected from the list.



User can click this icon and reset the roles to choose from the list, any new roles added, if any to the list under roles category

After selecting the required Environment and roles from the list, click on save icon.

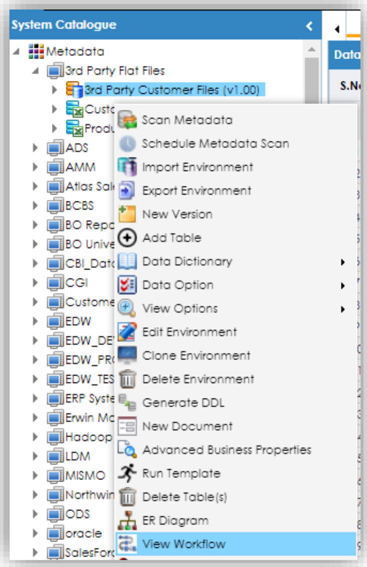


Once the workflow is assigned successfully to the respective Environment under Metadata catalogue, users who are part of assigned roles will get work queue notifications to initiate the workflow.

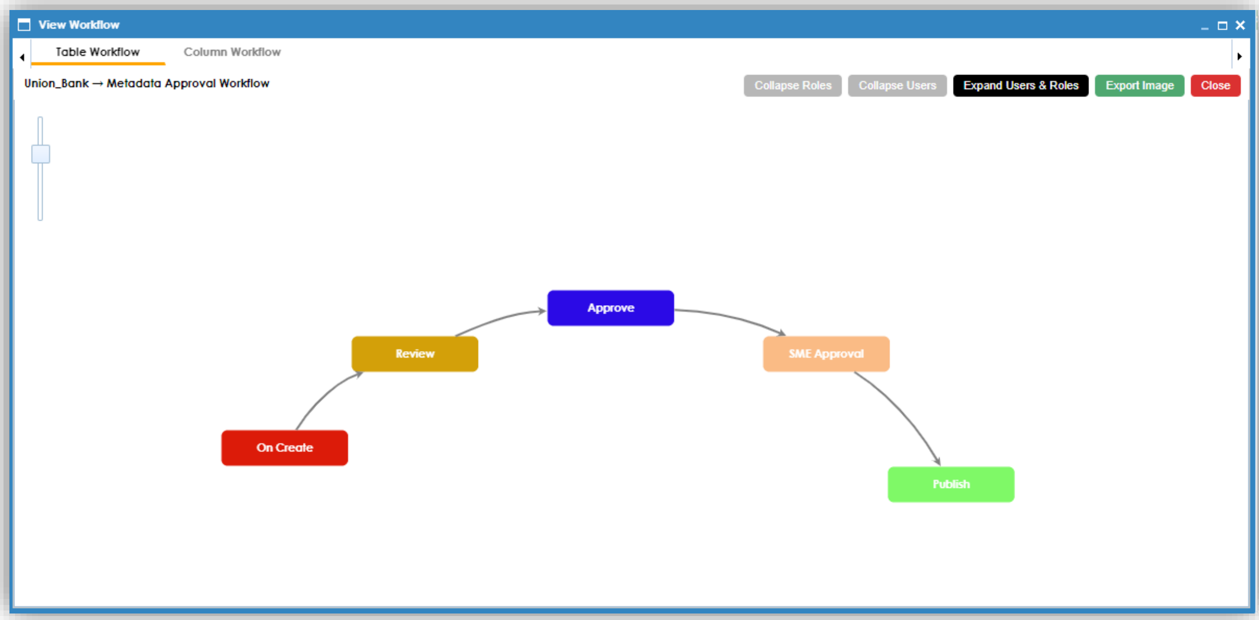
Click on the Unified Platform menu icon, and then navigate to the **Metadata Manager** module, to review and complete the workflow

To start the review process, user firstly needs to click on the respective Environment and then select the desired Table/Column and then click on "**Workflow Log**" to see the status of the workflow review.

Right Click on the required environment, and select "**View Workflow**" option, to view the workflow diagram

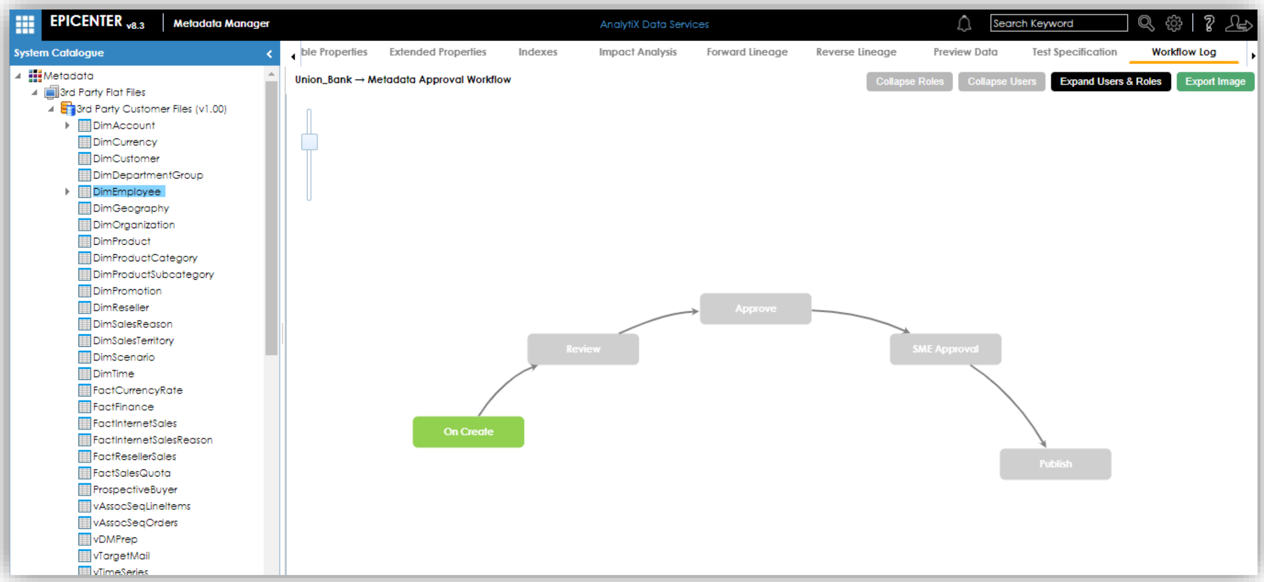


The workflow diagram will be same for the Table Workflow and the Column Workflow



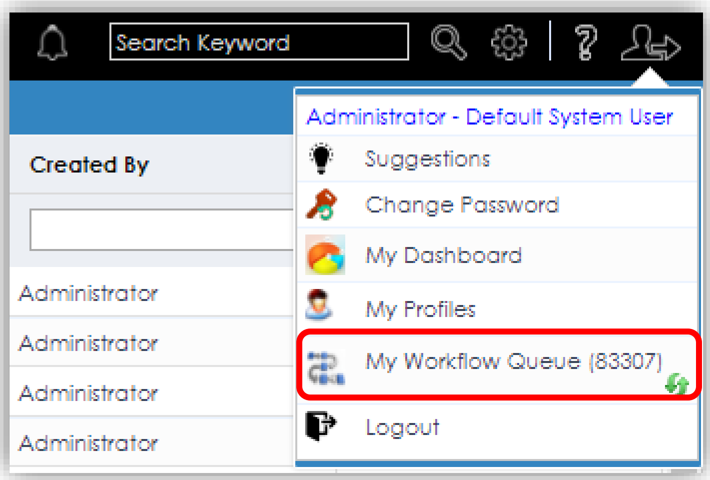
Both for the table level and the column level, the Workflow diagram will be same and the review can be started

This is how the workflow log will look, before starting for the review process

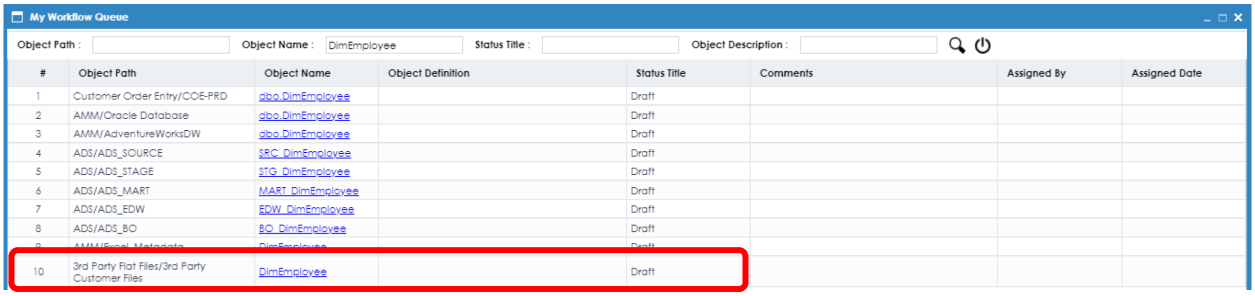


2.3 Workflow Execution through work queue notifications

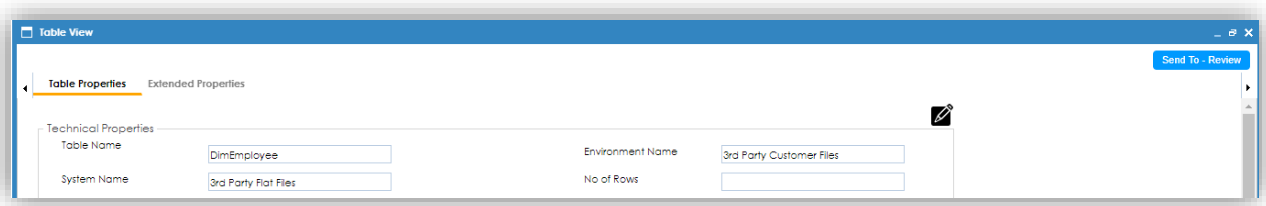
Now, click on the "**User-Profile icon**", in the top right-hand corner of the tool, to navigate to "**My Workflow Queue**", to initiate the workflow process for that particular table/ column.



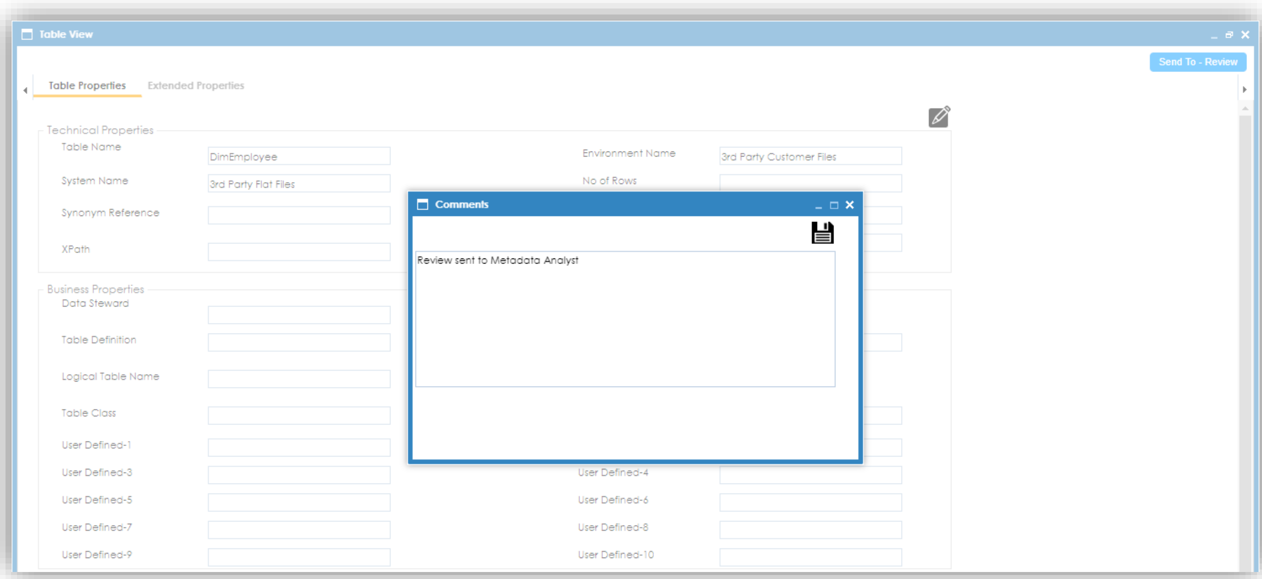
Click on the hyperlink of the table Name selected for the workflow process. A pop-up window appears with table/ column properties and user will view the information and click on "**Send To - Review**" icon Send To - Review, to send the review to the desired approver to complete the review process



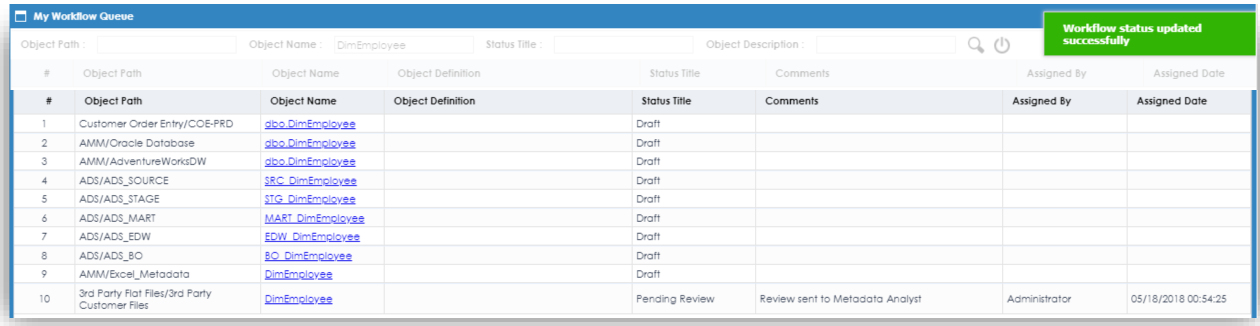
After user clicks the icon, a pop-up window opens to provide comments for the review process.



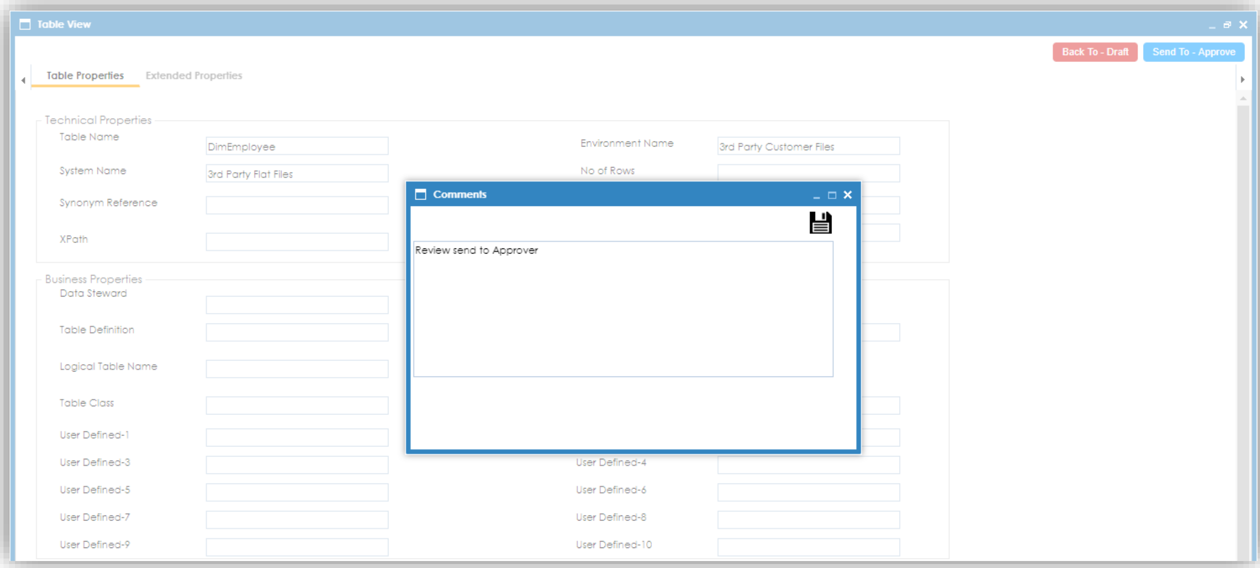
Enter the comments in the dialog box and click on save icon, to save the comments



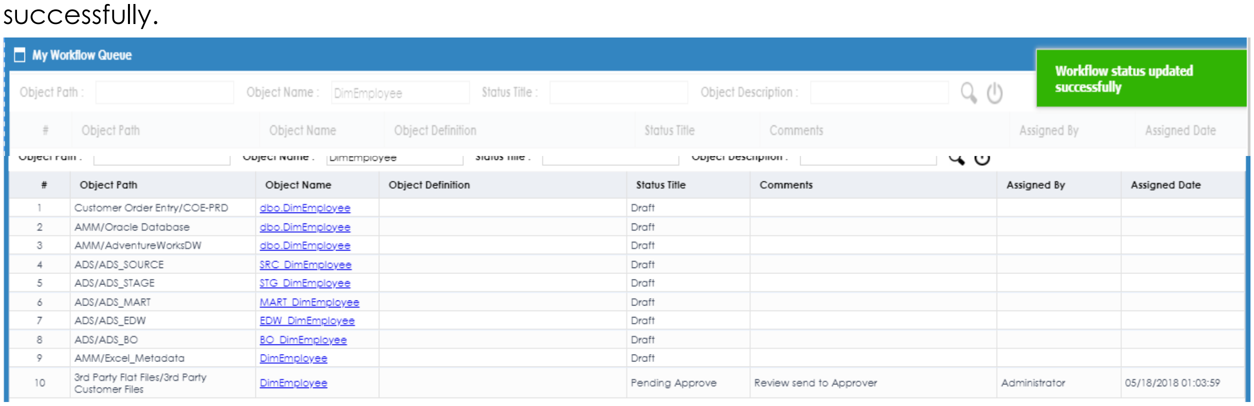
Workflow status was updated successfully.



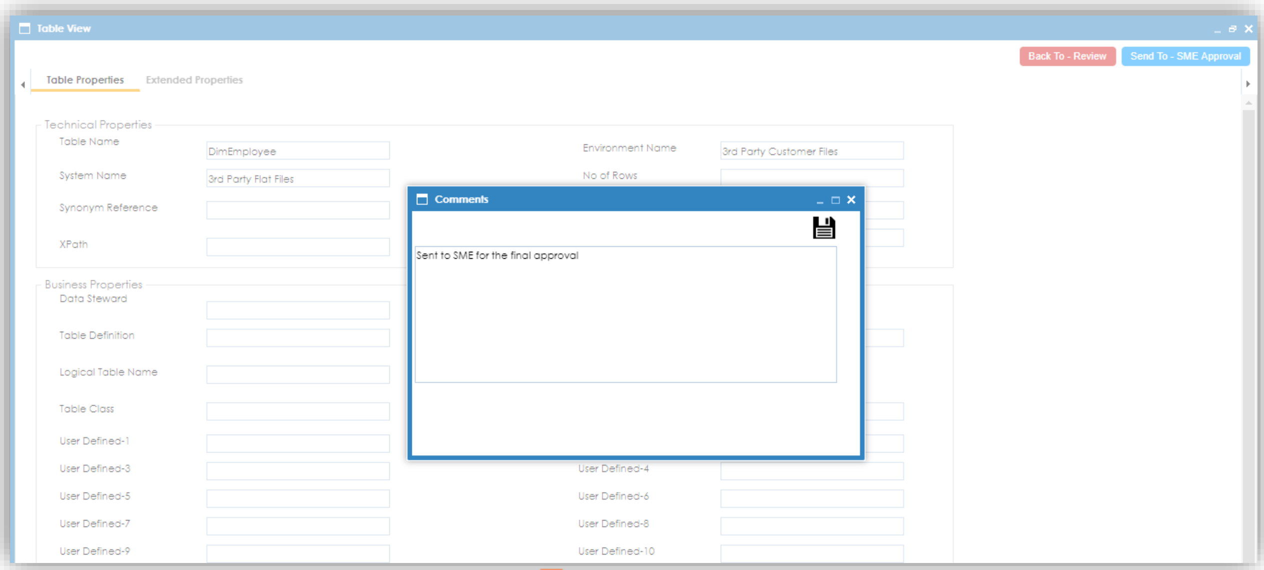
The next user will receive work queue notification. By navigating through hyperlink, user will review the table/column details and click on the Send To - Approve icon to send for the approval by providing the necessary comments.

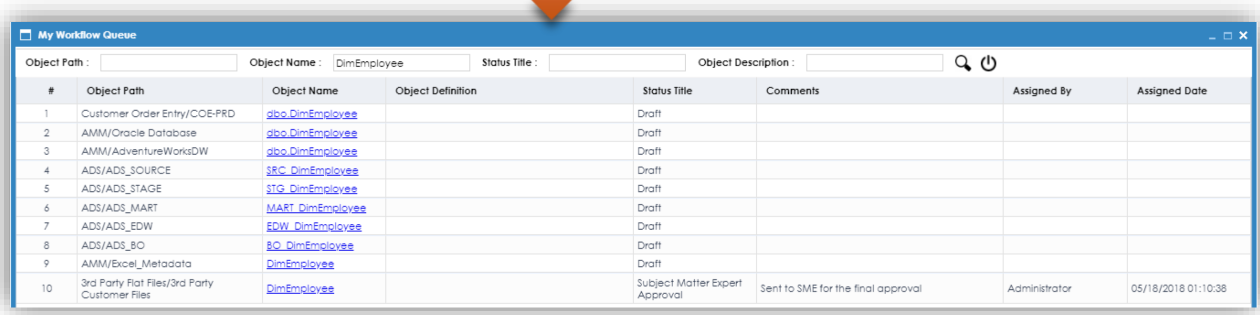


Once the user provides the comments, click on save icon, to update the workflow status successfully.



After the workflow gets updated, the review was finally sent to the next user i.e. SME approval and then the table workflow will be sent to publish, to complete the workflow process.

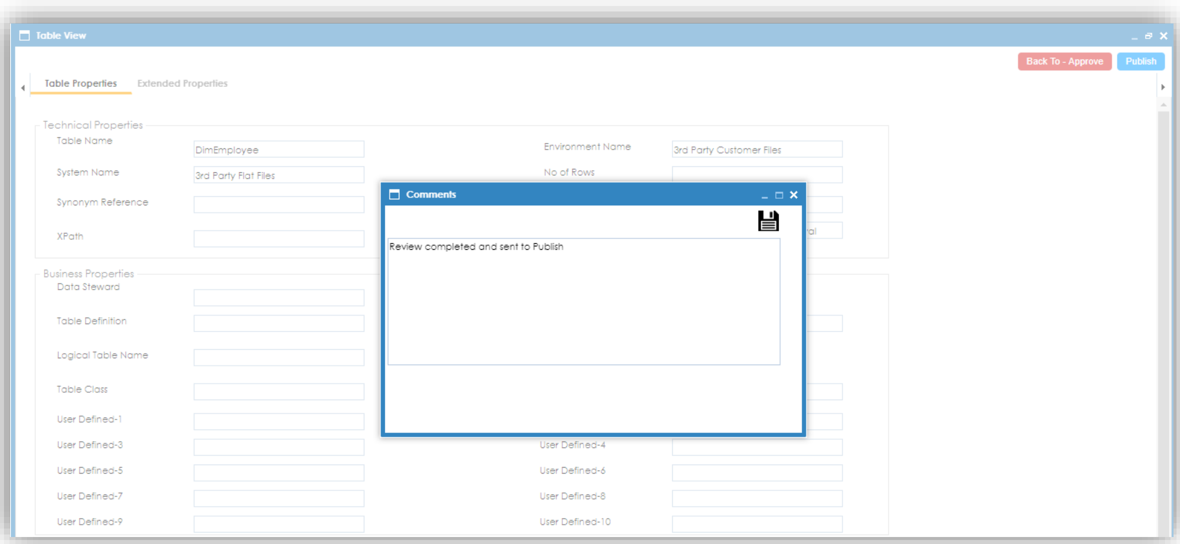




#	Object Path	Object Name	Object Definition	Status Title	Comments	Assigned By	Assigned Date
1	Customer Order Entry/COE-PRD	dbo.DimEmployee		Draft			
2	AMM/Oracle Database	dbo.DimEmployee		Draft			
3	AMM/AdventureWorksDW	dbo.DimEmployee		Draft			
4	ADS/ADS_SOURCE	SRC_DimEmployee		Draft			
5	ADS/ADS_STAGE	STG_DimEmployee		Draft			
6	ADS/ADS_MART	MART_DimEmployee		Draft			
7	ADS/ADS_EDW	EDW_DimEmployee		Draft			
8	ADS/ADS_BO	BO_DimEmployee		Draft			
9	AMM/Excel_Metadata	DimEmployee		Draft			
10	3rd Party Flat Files/3rd Party Customer Files	DimEmployee		Subject Matter Expert Approval	Sent to SME for the final approval	Administrator	05/18/2018 01:10:38

After the workflow gets updated, user needs to click on the same hyperlink for the required table to publish.

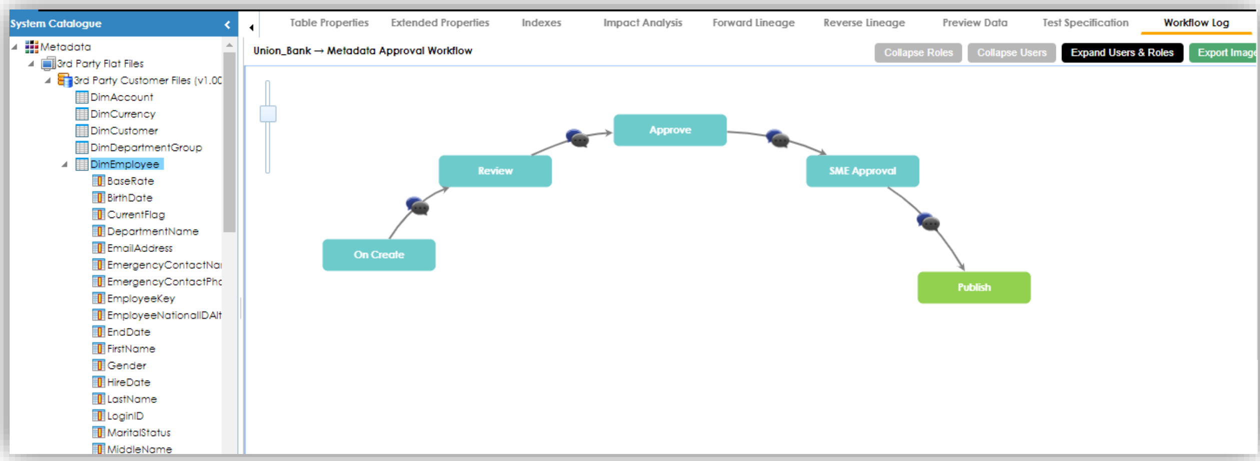
Click on the Publish icon, to publish the workflow status for the required table



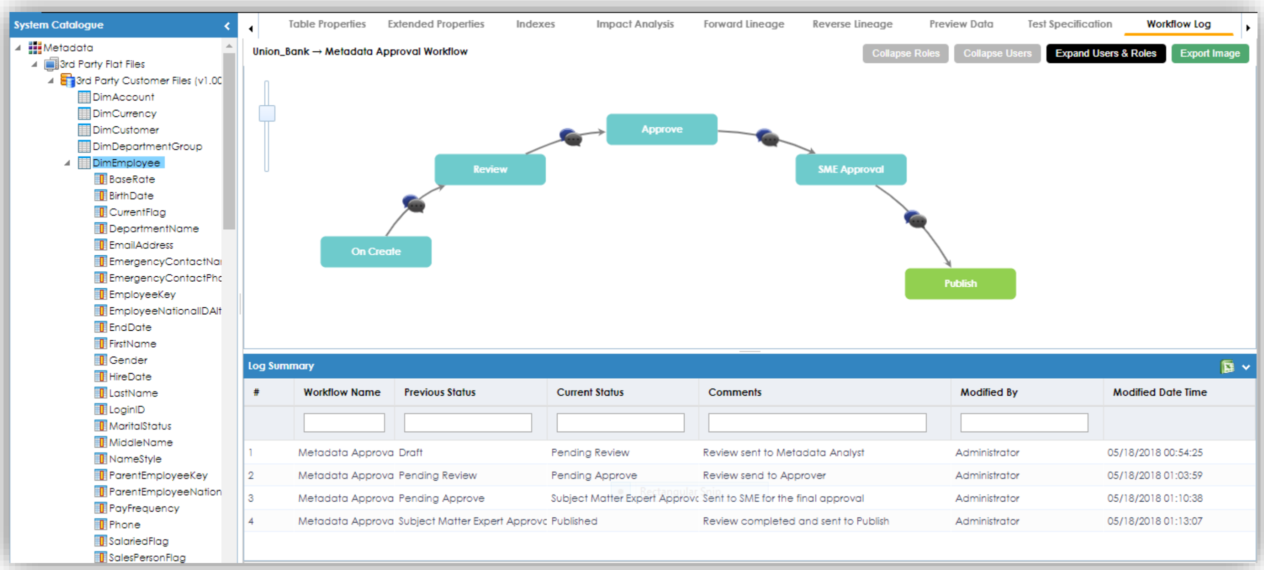
Once the user publishes the current table, the workflow log of the required table gets updated and the workflow diagram is updated accordingly

Once the table gets published, the workflow process gets completed.

User can view the "**Workflow log**" for the required table



A complete workflow analysis can be seen with the detailed log summary

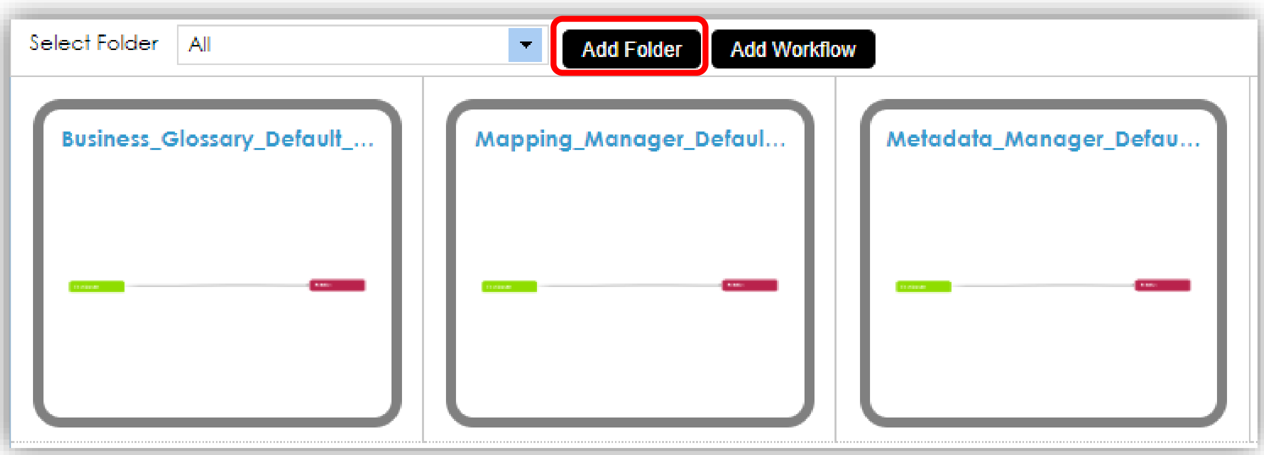


3. Business Glossary workflow

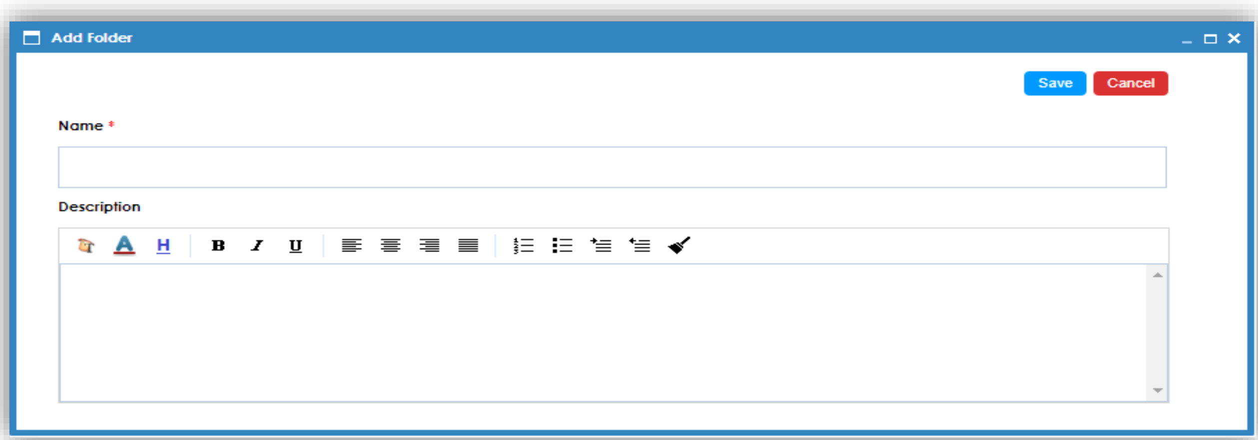
3.1 Workflow Creation & Configuration

Workflows are categorized and managed under folders.

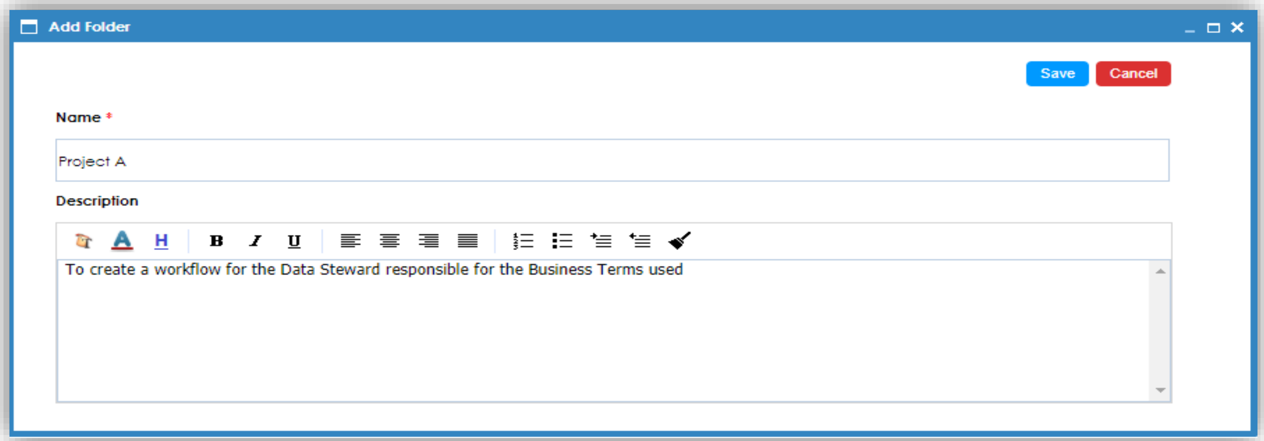
Click on **"Add Folder"** icon to add a new folder



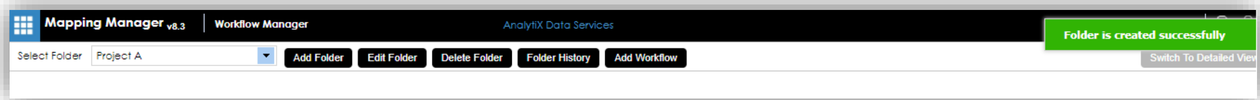
A pop-up window appears, where user needs to provide the Name and relevant description for the folder and click on save icon, to create a New Folder



Enter the folder name and description to create a New Folder.

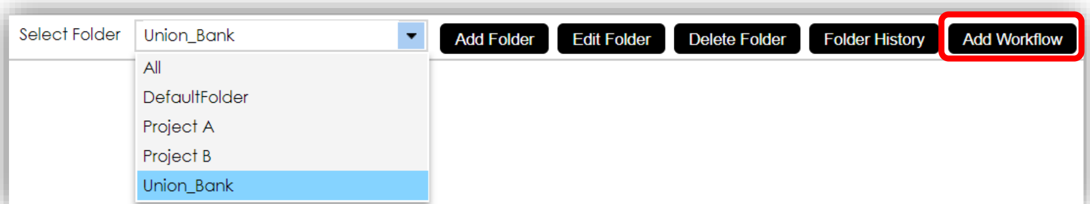


New folder for the Business Glossary Manager workflow is successfully created



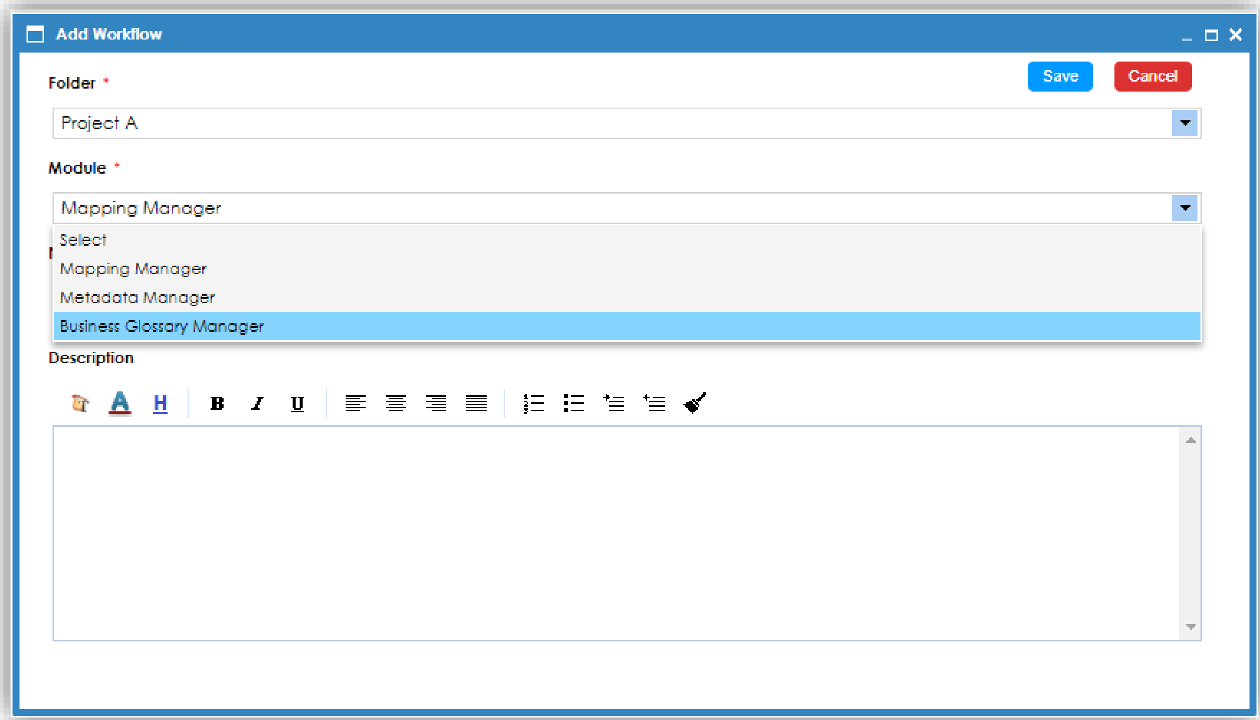
ADD WORKFLOW

Select the folder from the dropdown and Click on **"Add Workflow"** icon to define workflow for the required module. Select the module from the dropdown as shown in the below snapshot

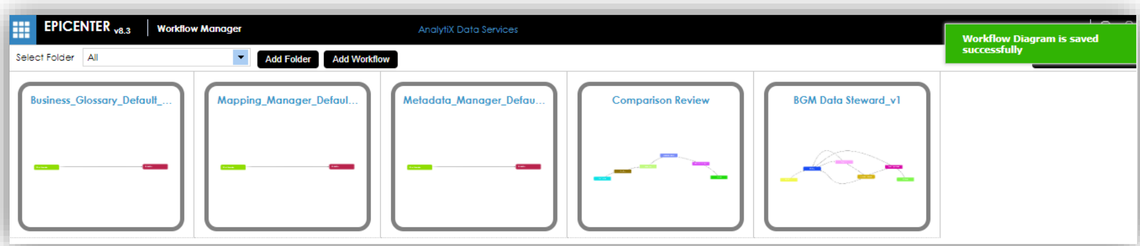


Select "**Business Glossary Manager**" module from the drop down and enter the Workflow name and Description of the workflow to add a new workflow.

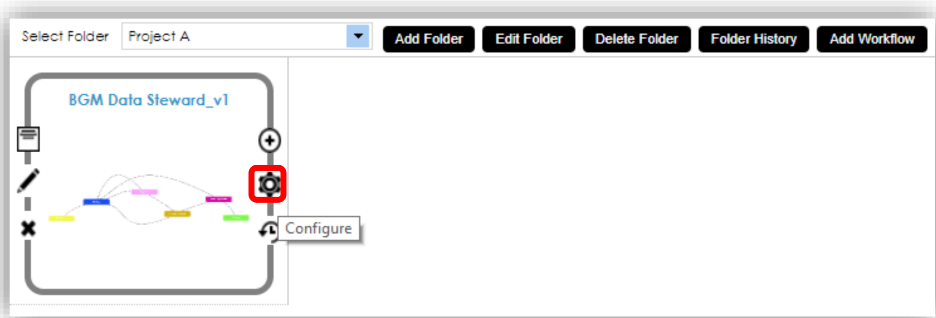
Click on Save icon, to create a New Workflow



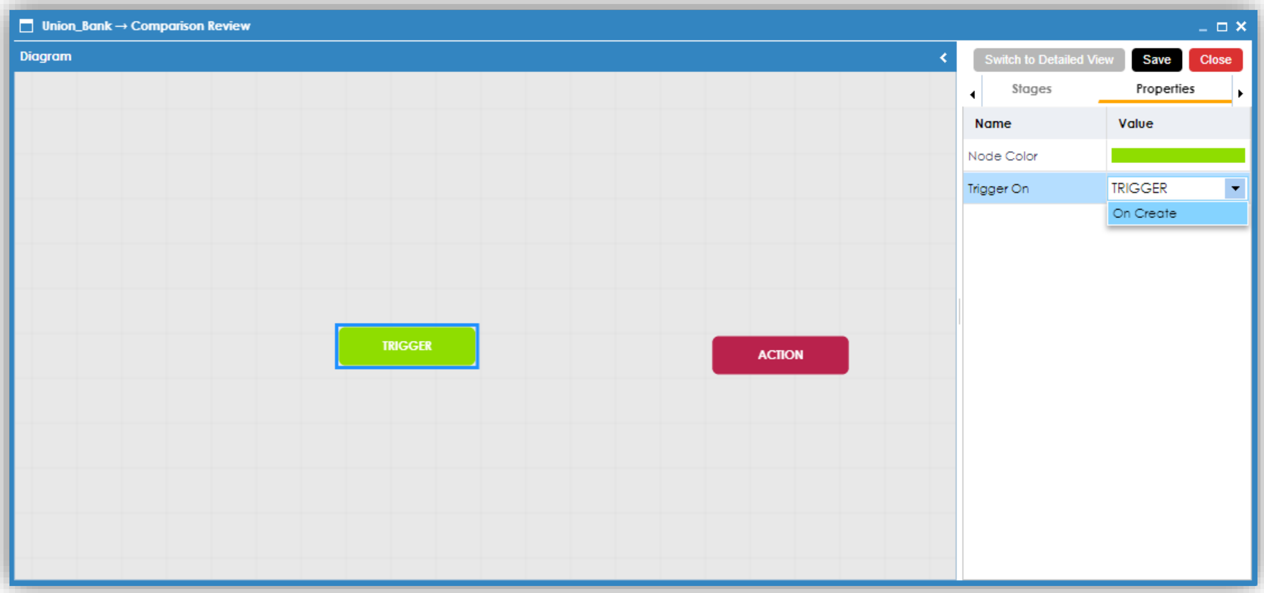
Workflow for the Business Glossary Manager is successfully created



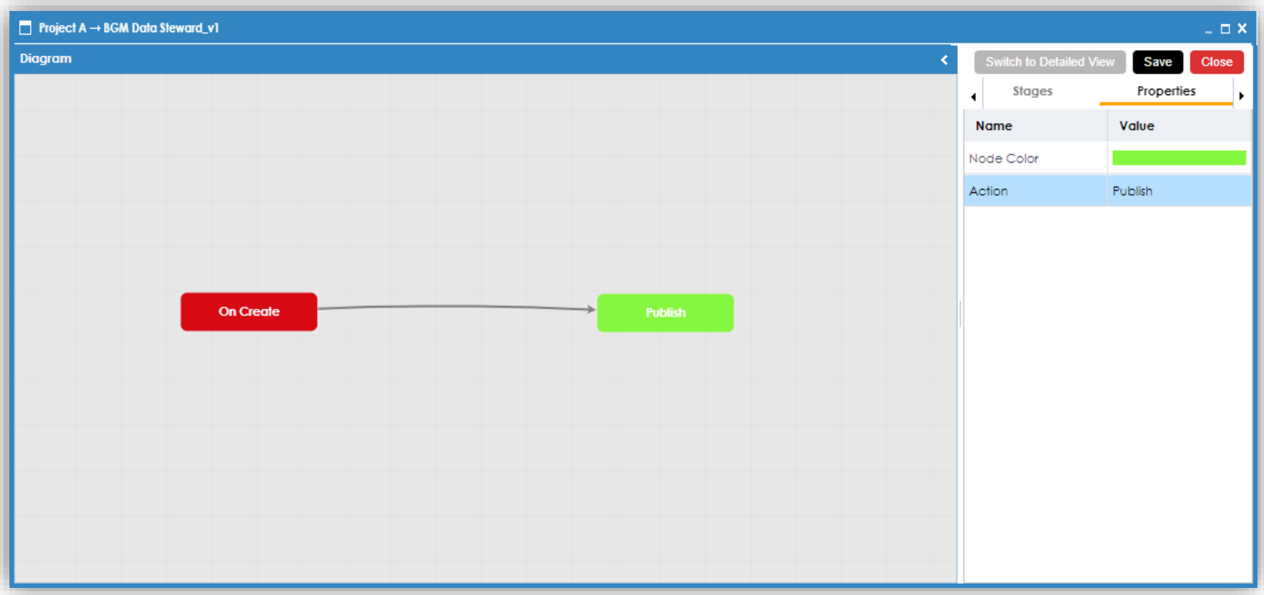
After creating the Workflow, click on the configure icon ⚙, to start creating workflow



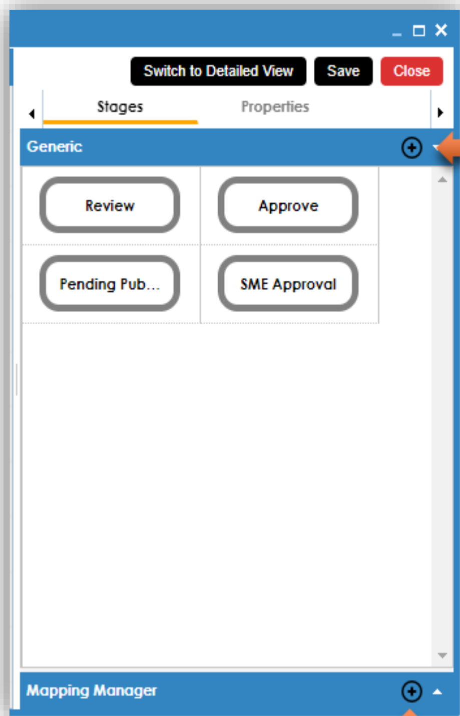
System will trigger default workflow stages and user will have the flexibility to change the naming standards from "**TRIGGER**" → "**On Create**" and "**ACTION**" → "**Publish**", to create the workflow diagram for the specified module.



Now, users can implement this straight-forward action, to complete the workflow diagram without including any generic stages

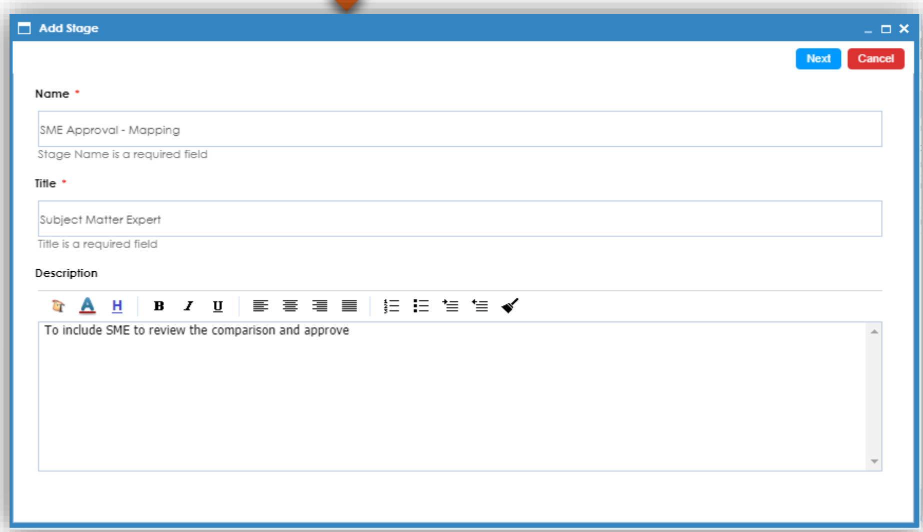


To include the customized generic or module specific stages, users need to click on the "**Stages**" section and click on ⊕ icon, to include required stages.



After clicking on this icon, a pop-up screen comes to enter the Name and Title for the stage.

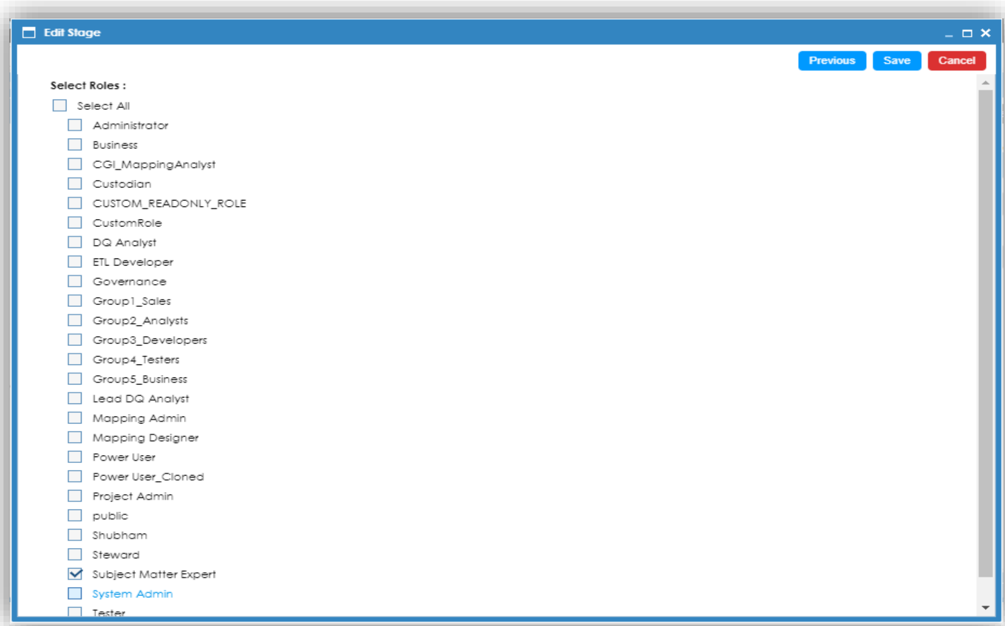
Enter the description for the stage and click on "**Next**" to select Roles for the stage



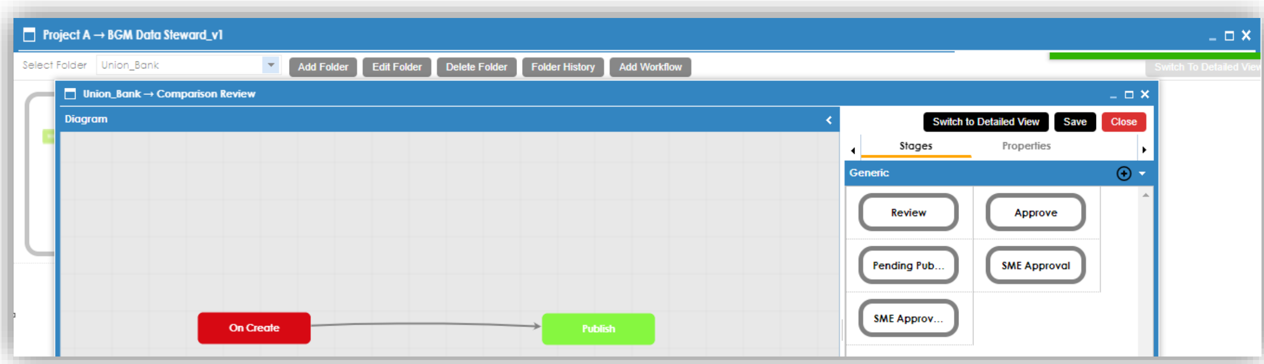
Module specific stages can also be created in the similar way to include into workflow diagram

After selecting the appropriate roles for the stage, click on save icon, to add stage to the workflow diagram.

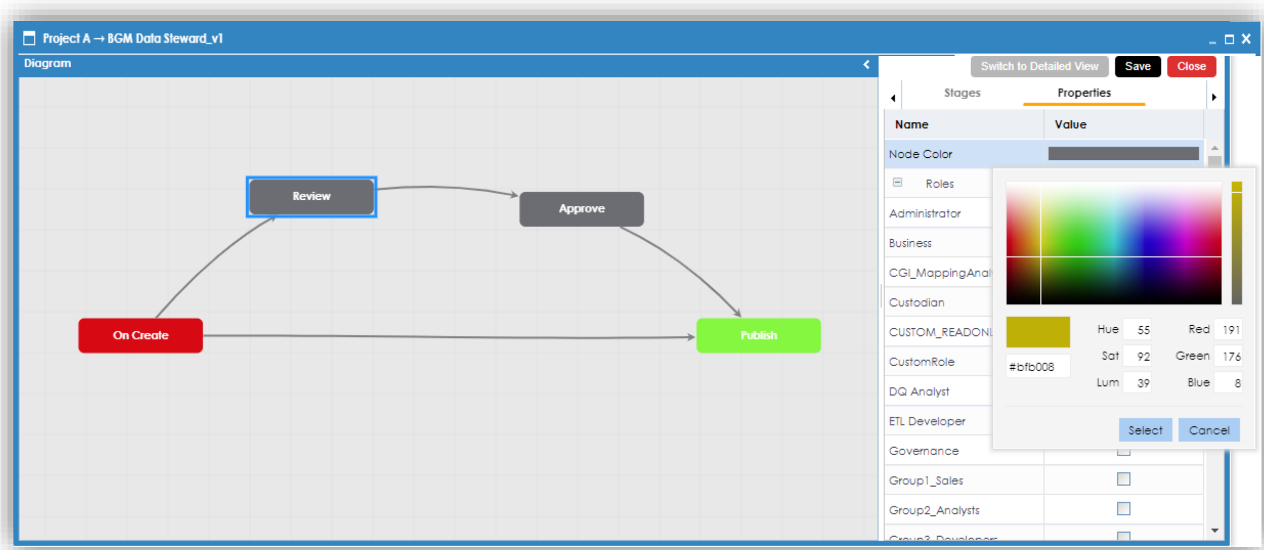
Customized generic stage is created successfully



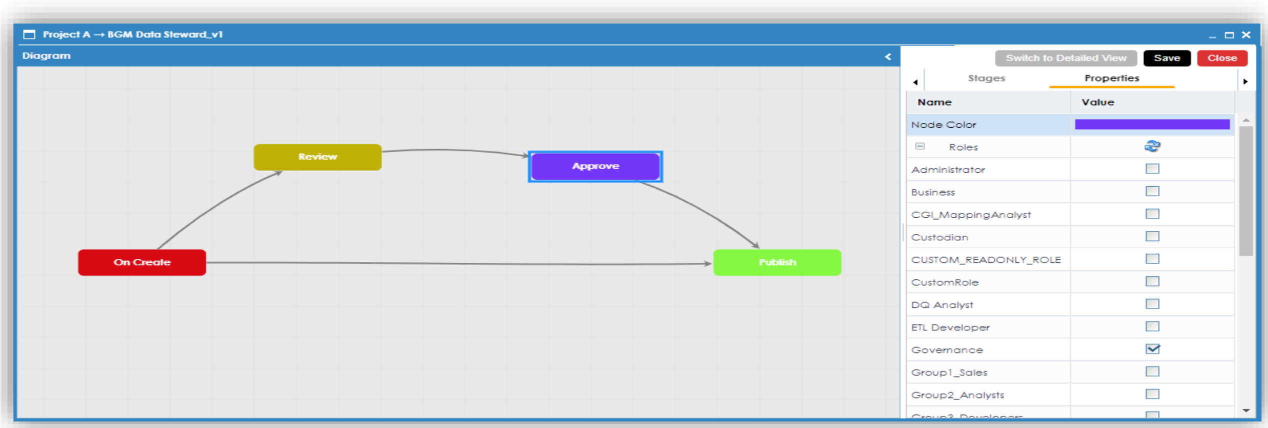
Customized generic stage is created successfully



User can now have the flexibility to update node colors and update roles if required

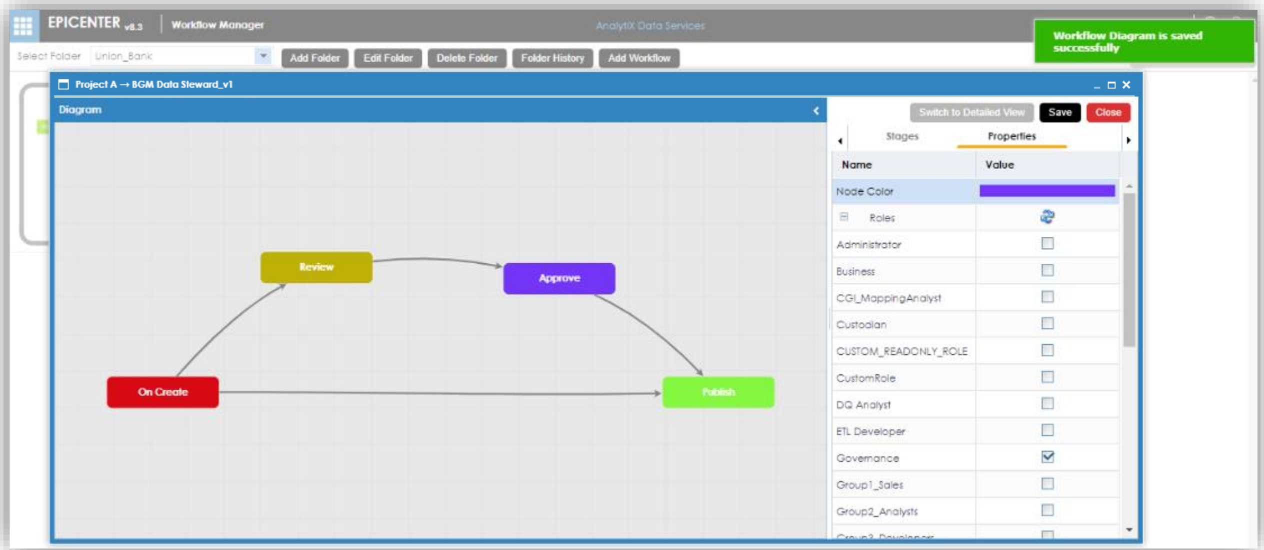


User will click on “**save**” icon to complete the workflow diagram.



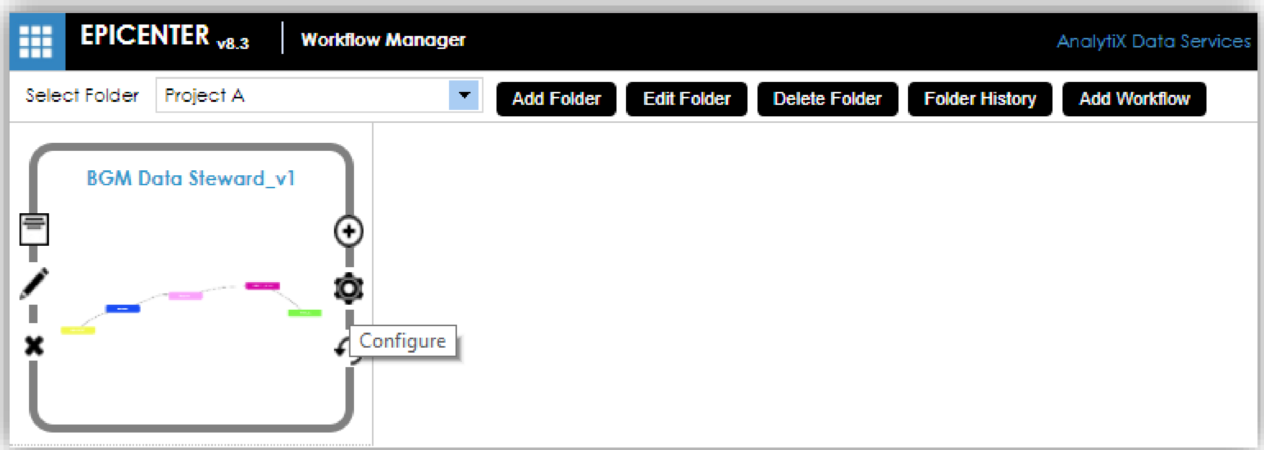
Workflow Diagram will be successfully created

Snapshot below attached shows the workflow diagram with stages assigned with specific roles

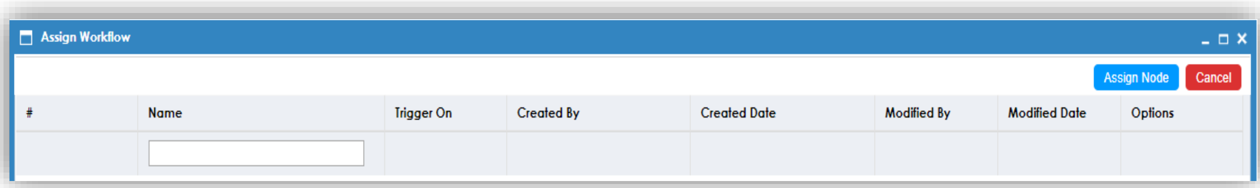


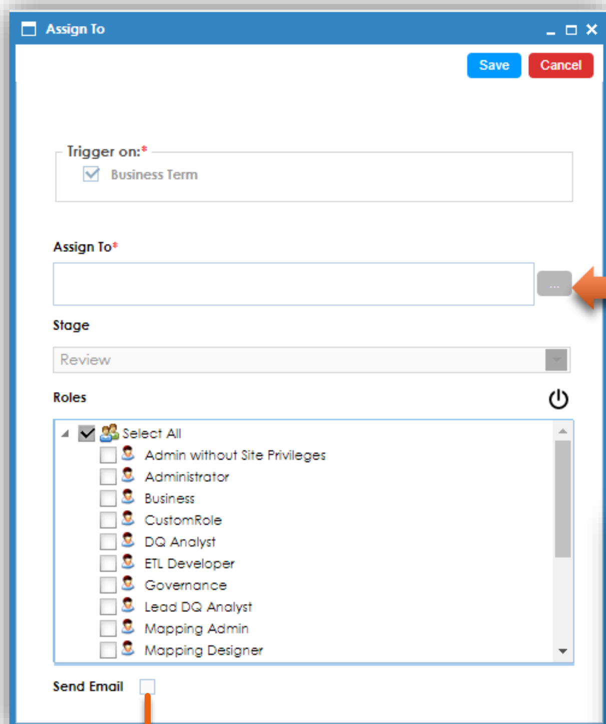
3.2 Workflow Assignment to Business Terms (Objects)

After creating the workflow diagram, select the created workflow and click on ⊕ icon to assign workflow to the existing Terms from the Business Glossary Manager module. User will have option to review and update roles for the each stage if required, so that the respective users who have access to that roles will receive work queue notifications.

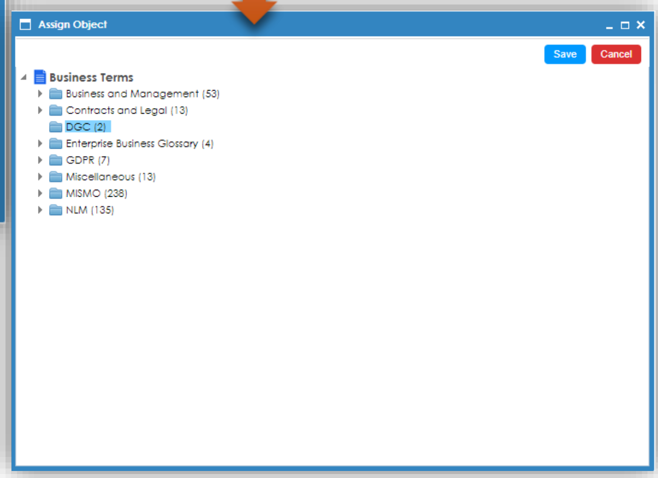


Click on "**Assign Node**" icon to select the Projects from the list

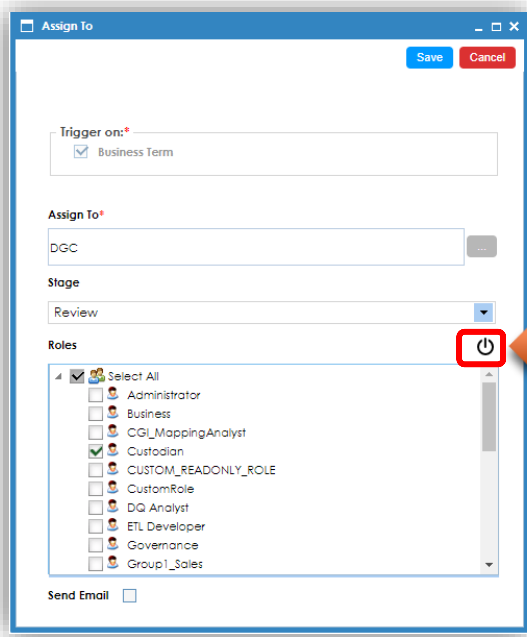




Click on the Load Nodes icon, and select the respective Business Terms for assigning to the Business Glossary Manager

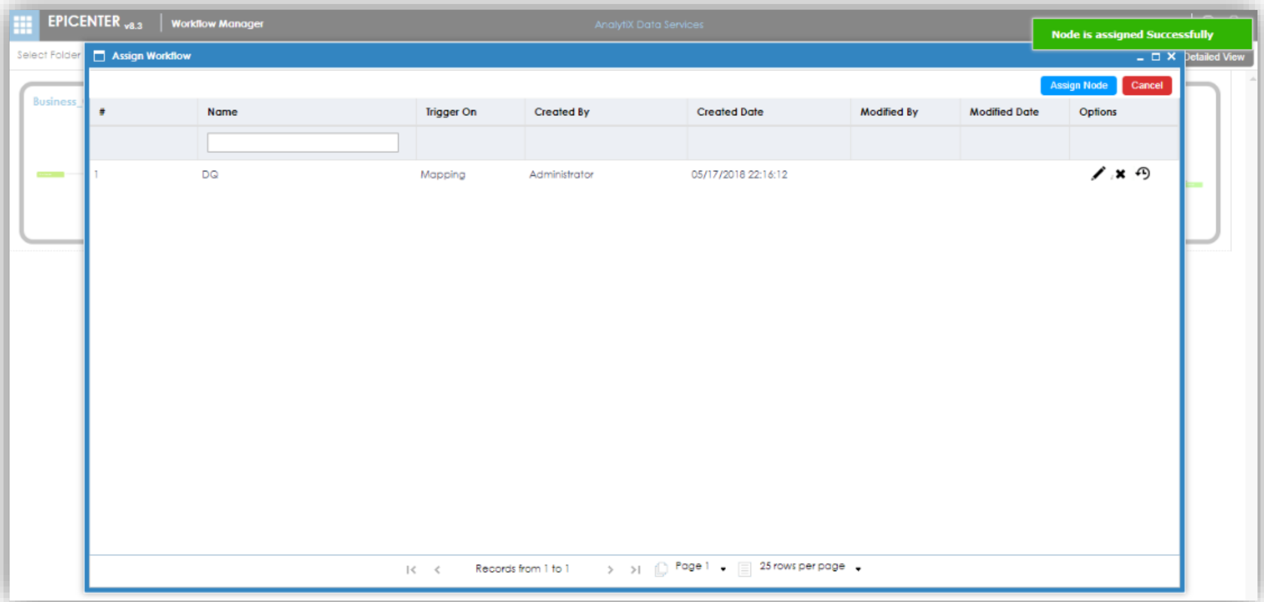


Users can also click on the "**Send Email**",
Checkbox, to send email notification



User can click this icon and reset the roles to choose from the list, any new roles added, if any to the list under roles category

After selecting the required Business Terms and users from the list, click on save icon

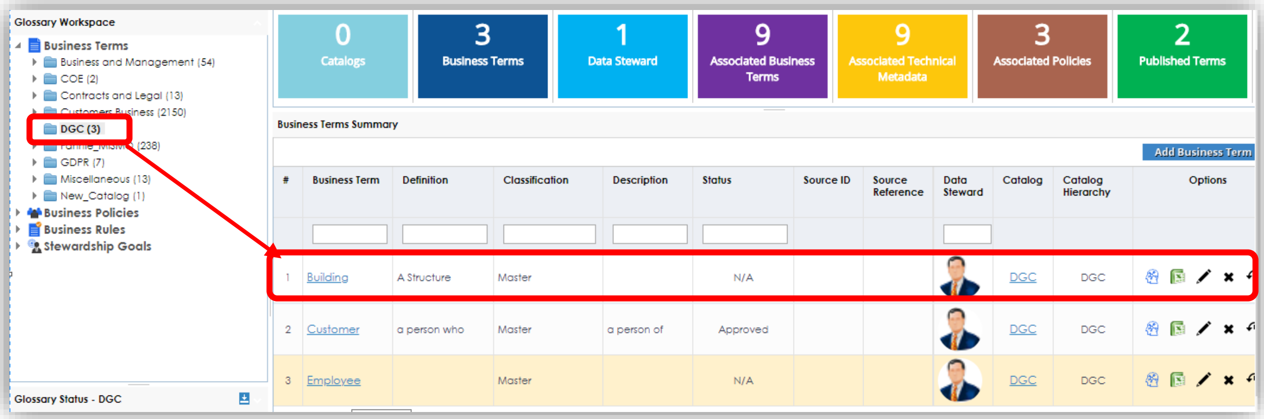


Once the workflow is assigned successfully to the respective Business Term, users who are part of assigned roles will get work queue notifications to initiate the workflow.

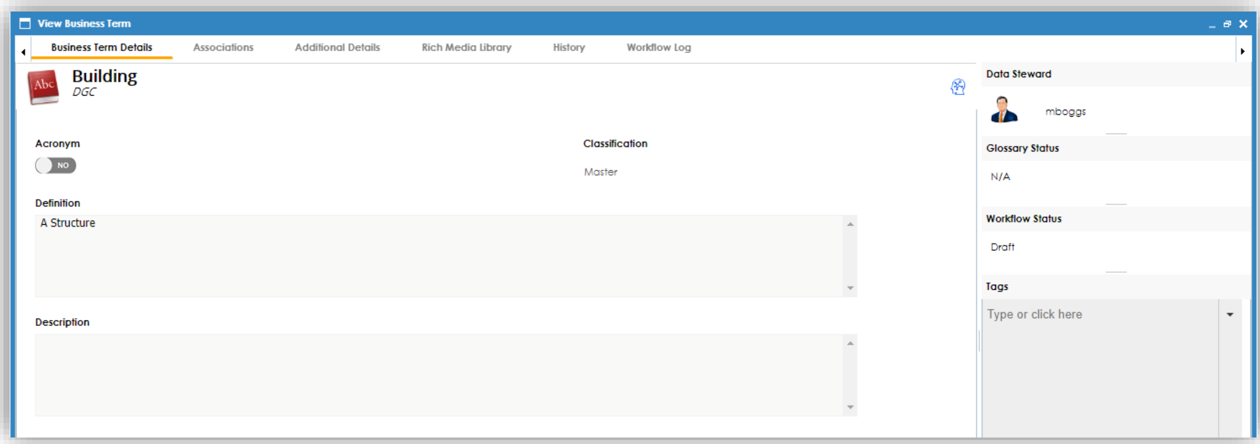
3.3 Workflow Execution through work queue notifications

Click on the Unified Platform menu icon, and then navigate to the **Business Glossary Manager** module, to view the workflow.

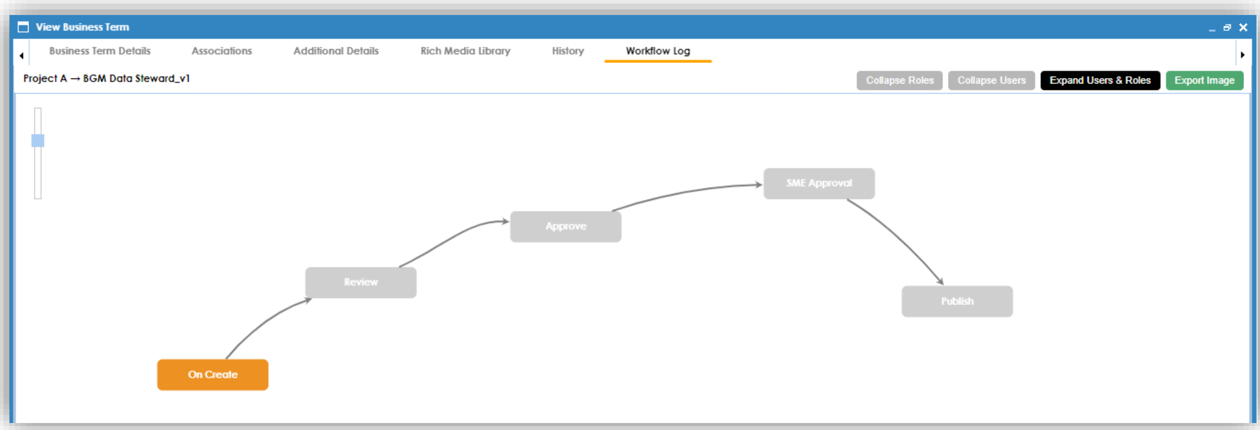
Click on the hyperlink of the Business Term under Business Terms summary i.e. "**Building**".

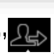


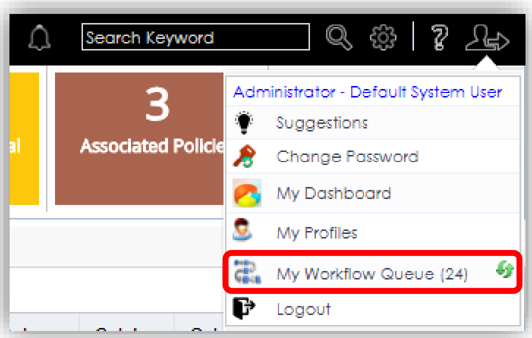
To start the review process, user firstly needs to click on the catalog and then click on "**Workflow Log**" to see the status of the business term.



This is how the workflow log will look, before starting for the review process

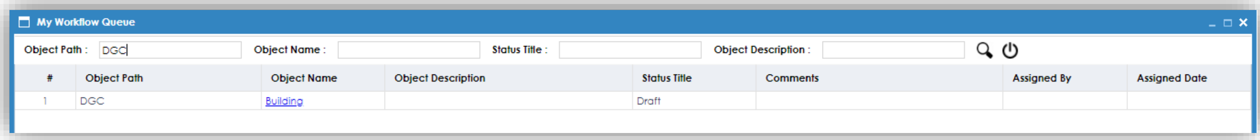


Now, click on the "**User-Profile icon**", in the top right-hand corner of the tool, to navigate to "**My Workflow Queue**", to complete the workflow process for that particular Business Term.

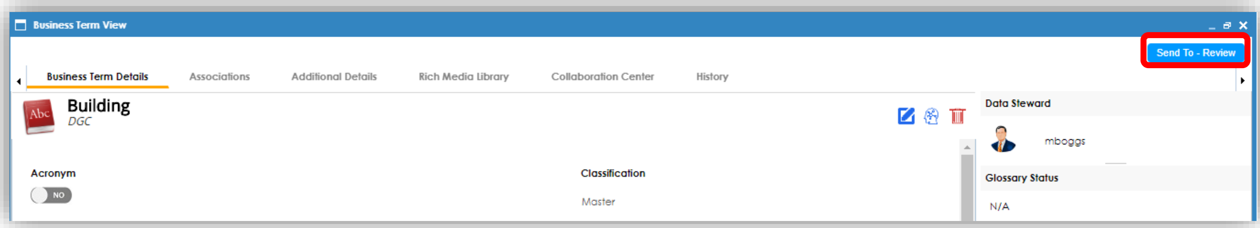


A pop-up window comes and user needs to click on "**Send To - Review**" icon Send To - Review, to send the review to the desired approver to complete the review process

Click on the hyperlink of the business term (e.g. **Building**), to complete the workflow review.

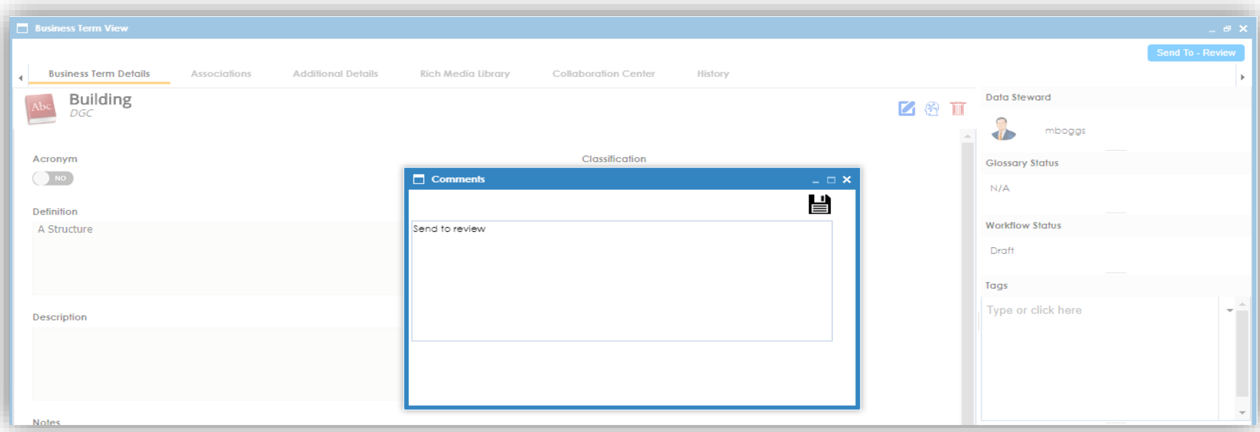


A pop-up window appears with the Business Term details and user will review the information and click on "**Send to Review**" option.

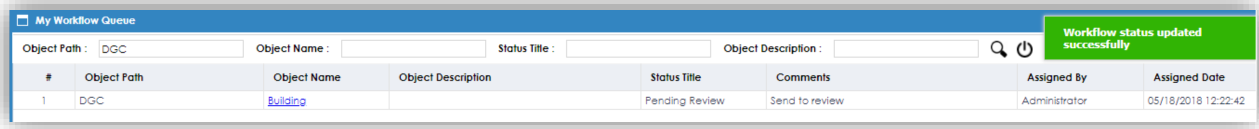


After user clicks the icon, a pop-up window opens to provide comments for the review process.

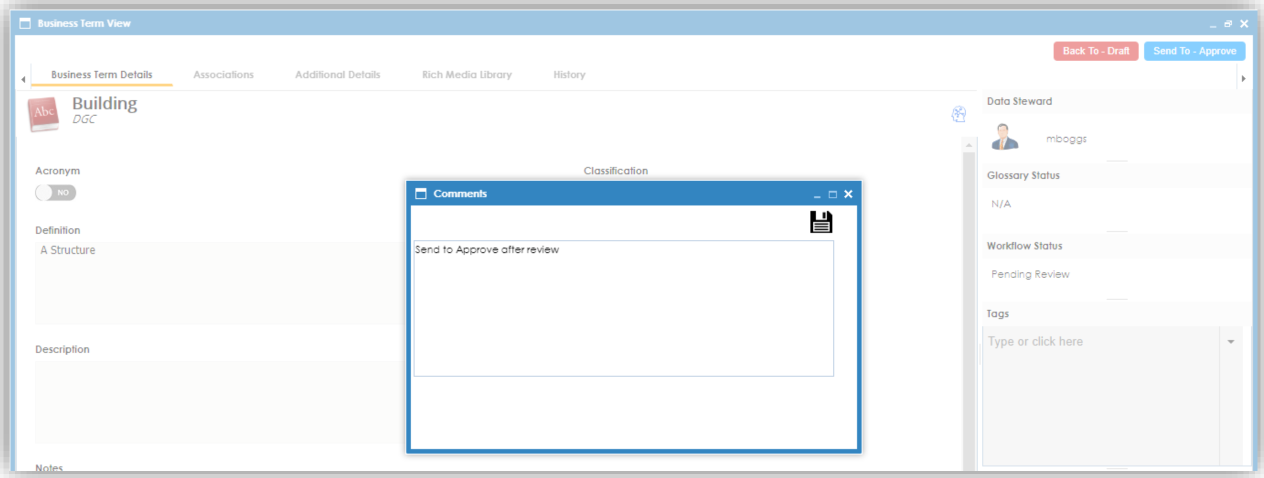
Enter the comments in the dialog box and click on save icon, to save the comments



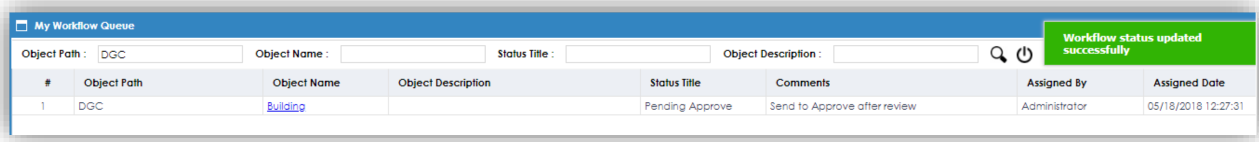
Workflow status updated successfully.



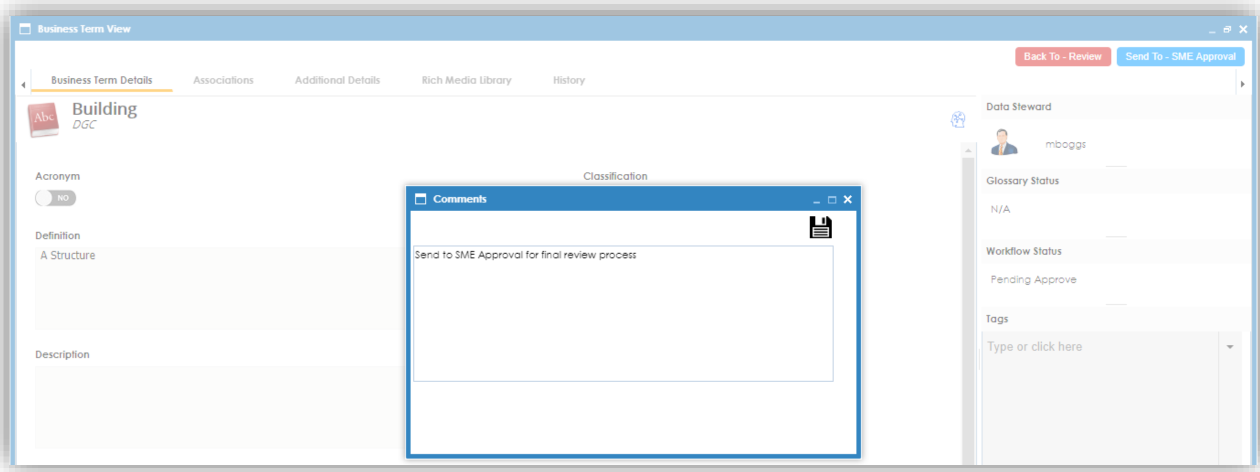
The next user will receive work queue notification. By navigating through hyperlink, user will review the details and click on the Send To - Approve icon to send for the approval by providing the necessary comments.



Once the user provides the comments, click on save icon, to update the workflow status successfully.

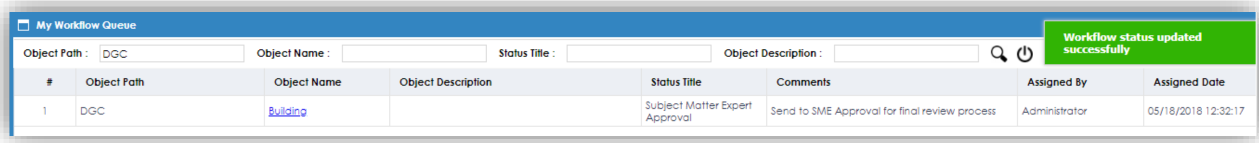


After the workflow is updated, user needs to send the review to last approver to complete the workflow process



Provide the optional comment to save the review for completion.

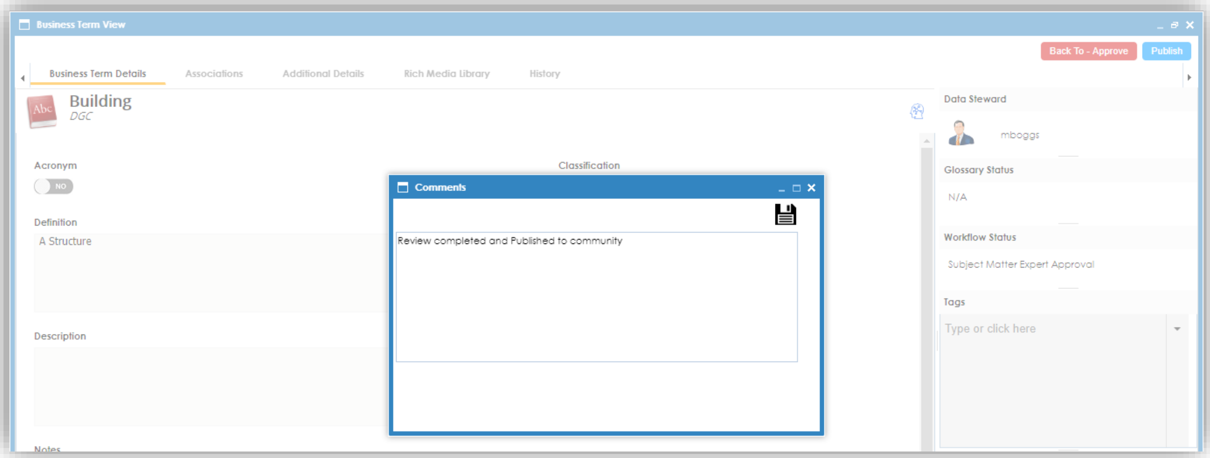
After user clicks on the save icon, the workflow status is updated successfully.



After the workflow gets updated, user needs to click on the same hyperlink for the required details of the Business Term.

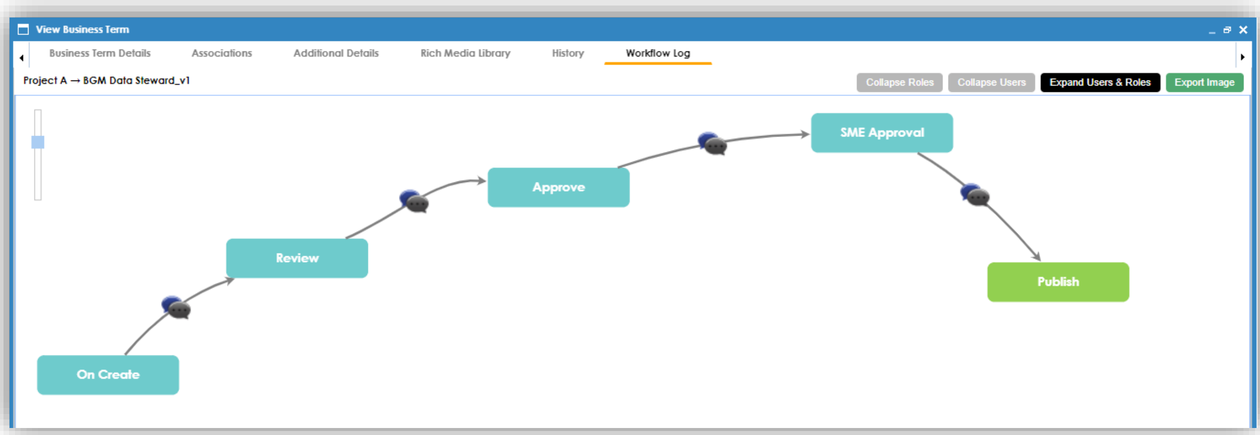
Click on the 

icon, to publish the workflow status for the required business term



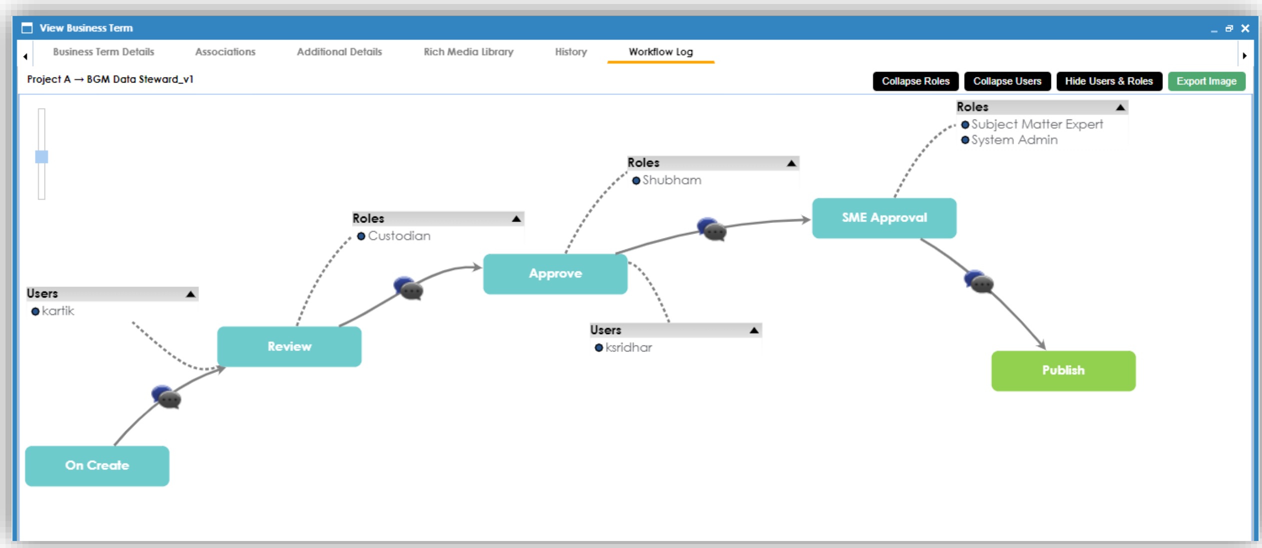
Once the user publishes the current Business Terms details, the required term gets published and the workflow diagram is updated accordingly

Click on the business term hyperlink under Business Terms summary, to view the complete Workflow log



Users also have the option, to "**Export Image**" to jpeg file format.

Also, if clicked on "**Expand Users & Roles**" – will show all the users and roles associated with each stages to check, which role was provided to that user for review purpose.



To view the final workflow process, right click on the Business Term, and click on the "View Workflow" option, to view the final workflow process